



# SIMPLE DOC MANAGER USER'S GUIDE

(Release. 4.1.0)

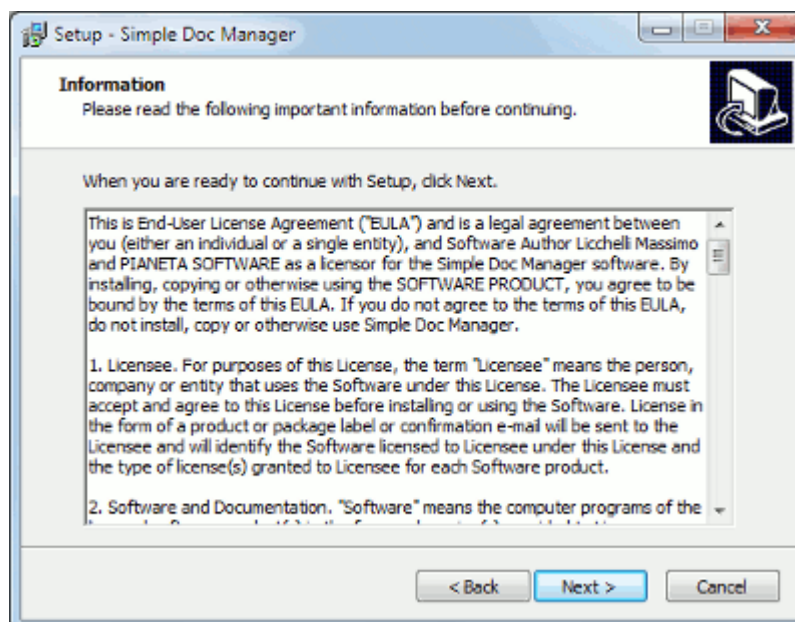
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## Installing

To start installing Simple Doc Manager, double click on SimpleDocManagerSetup.exe. The following page will open:



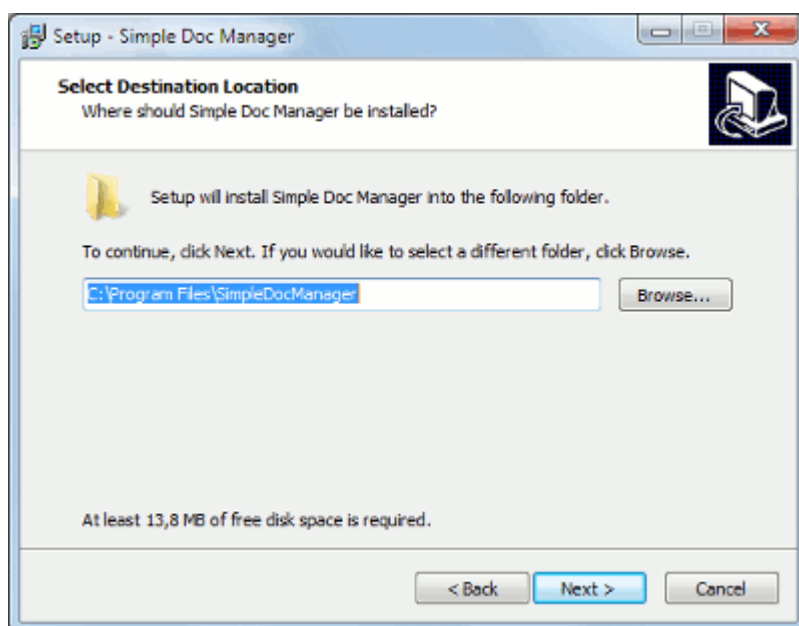
Click on Next



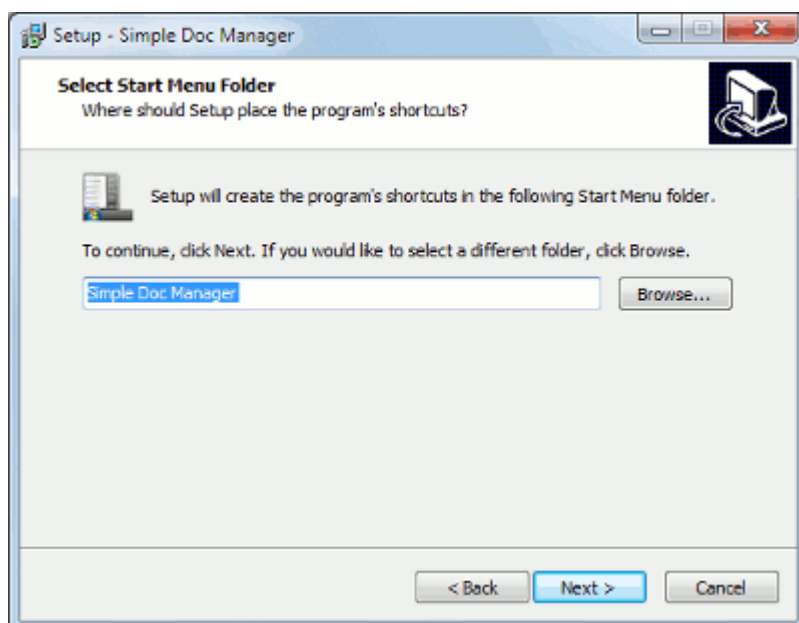
Read the software User's license and then click on Next

**This implies full acceptance of all terms of the contract.**

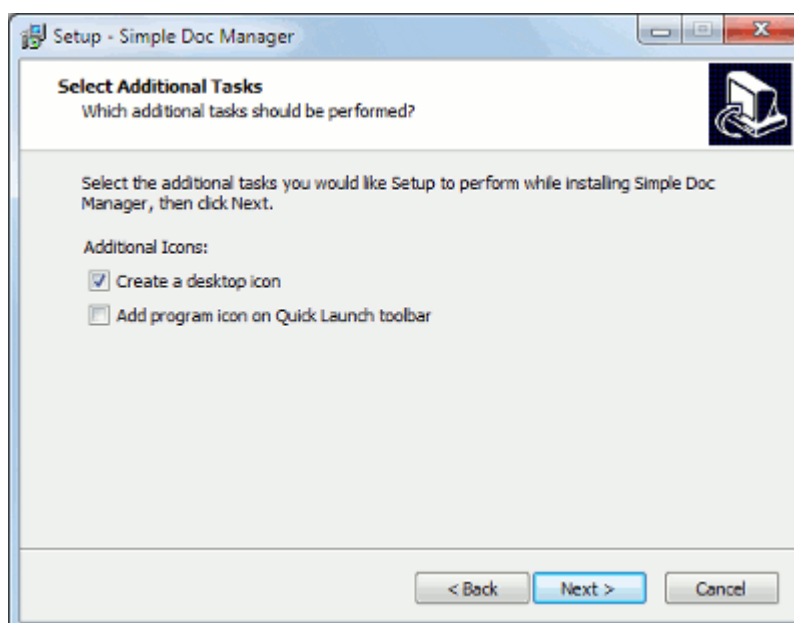
**PIANETA SOFTWARE** Via Dante de Blasi, 66 - 73100 Lecce ITALY - VAT IT03680320755  
Tel.(+39) 0832.354162 e-mail: info@simpledocmanager.com - Internet: www.simpledocmanager.com



The software will be installed by default in folder C:\Program Files\SimpleDocManager\ It is possible to change the installation folder, but we recommend to leave the suggested destination.

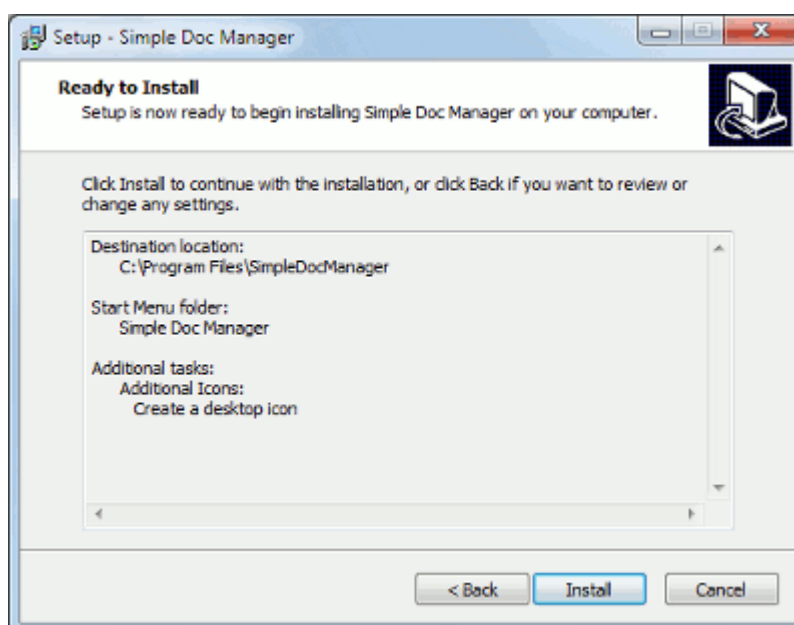


This is where you may select name for the shortcuts to appear on your Start Menu.



In this window you may create an icon for the Software Quick Start:

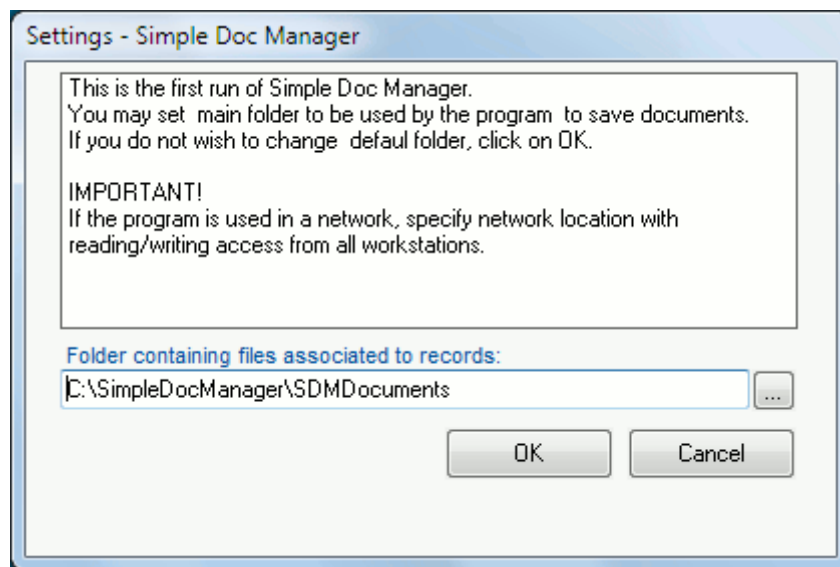
- On your Desktop (tick on the first option)
- On your Quick Launch toolbar (tick on the second option)



The set-up preferences are now complete.  
Click on Install, to complete installation.

## First Run

The first time you run the Software, you need to set-up the directory that the software will use to save all files associated to your records, through the following window:



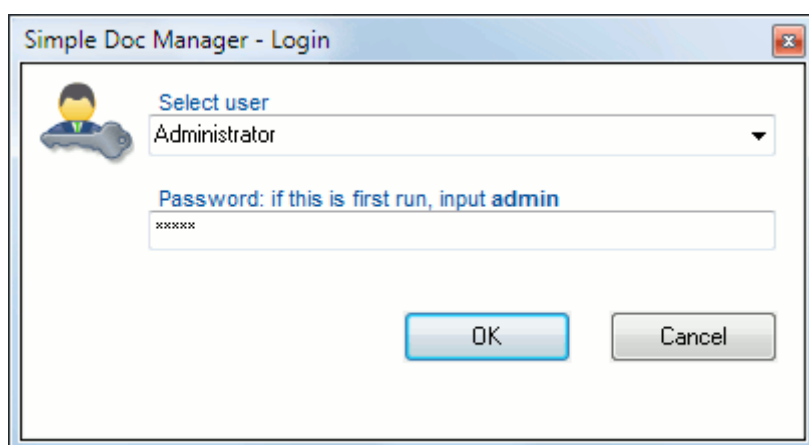
If the software will be used in a network with more than one workstation, it is important to specify a directory which will be available for reading and scripting by all workstations.

## Login

Access to the software is protected by a password. The software is multi-user, keeping track of which user recorded each single document.

Users are managed from the Settings window (explained later in this guide)

A default User with UserID **Administrator** and password **admin** has been pre-set.



## Features

This software allows management of your company's documents and mail, in a simple, fast and efficient manner, with related scanning in digital format.

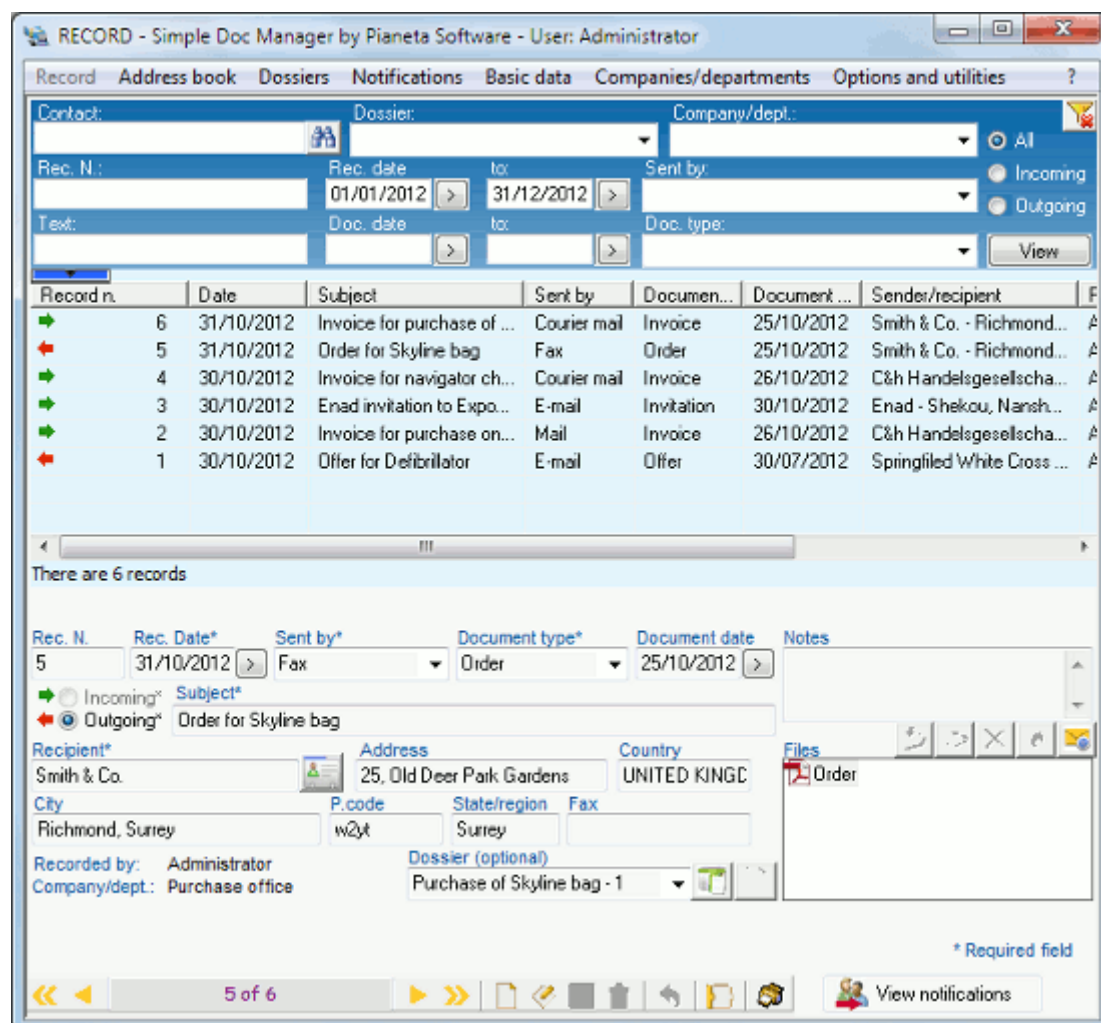
With a few clicks, you can memorize all data of each document, associating it to one or more files. You can even start scanning from the software, which will take charge of memorizing and managing the image file.

The integrated search engine is a powerful tool, allowing search of a document by all parameters (Sender/recipient, subject, record date, document date, sending type, type of document, incoming/outgoing and of course number of record).

There are 7 main windows in the software, all easily reachable through the main menu:

1. Record
2. Address book
3. Dossiers
4. Notifications
5. Basic data
6. Companies/ departments
7. Options and Utilities

## Record



Record n.	Date	Subject	Sent by	Documen...	Document ...	Sender/recipient	F
6	31/10/2012	Invoice for purchase of ...	Courier mail	Invoice	25/10/2012	Smith & Co. - Richmond...	A
5	31/10/2012	Order for Skyline bag	Fax	Order	25/10/2012	Smith & Co. - Richmond...	A
4	30/10/2012	Invoice for navigator ch...	Courier mail	Invoice	26/10/2012	C&h Handelsgesellscha...	A
3	30/10/2012	Enad invitation to Expo...	E-mail	Invitation	30/10/2012	Enad - Shekou, Nansh...	A
2	30/10/2012	Invoice for purchase on...	Mail	Invoice	26/10/2012	C&h Handelsgesellscha...	A
1	30/10/2012	Offer for Defibrillator	E-mail	Offer	30/07/2012	Springfield White Cross ...	A

There are 6 records

Rec. N. 5 Rec. Date\* 31/10/2012 Sent by\* Fax Document type\* Order Document date 25/10/2012 Notes

Incoming\* Subject\* Order for Skyline bag

Outgoing\*

Recipient\* Smith & Co. Address 25, Old Deer Park Gardens Country UNITED KINGC

City Richmond, Surrey P.code w2yt State/region Surrey Fax

Recorded by: Administrator Dossier (optional) Purchase of Skyline bag - 1

Company/dept.: Purchase office

\* Required field

5 of 6 View notifications

This is the software's main frame.

At the top, you will find a blue bar with the various selection options, to easily find previously input records.

In the centre of the frame all recorded documents are shown, corresponding to filters previously selected in the above blue bar.

The lower part shows details of current document, or document selected from the list, allowing new input operations or modifying of a certain record.

Clicking on Print  you can either print:

- A label to be put on document with record number, date and, if allowed, a bar code identifying the record (see Bar Code chapter)
- A record receipt
- A detailed list of records
- A detailed list of records without notes



## ***Inputting a new Record***

All input or modification operations of a record are managed through the record navigation bar at the bottom.



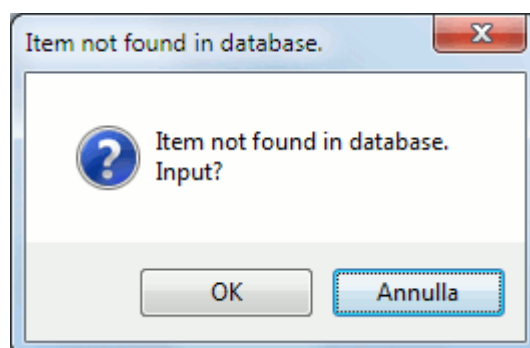
To record a new document, click on the “new record” icon 

All fields will be cleared and the frame will be ready for a new input.

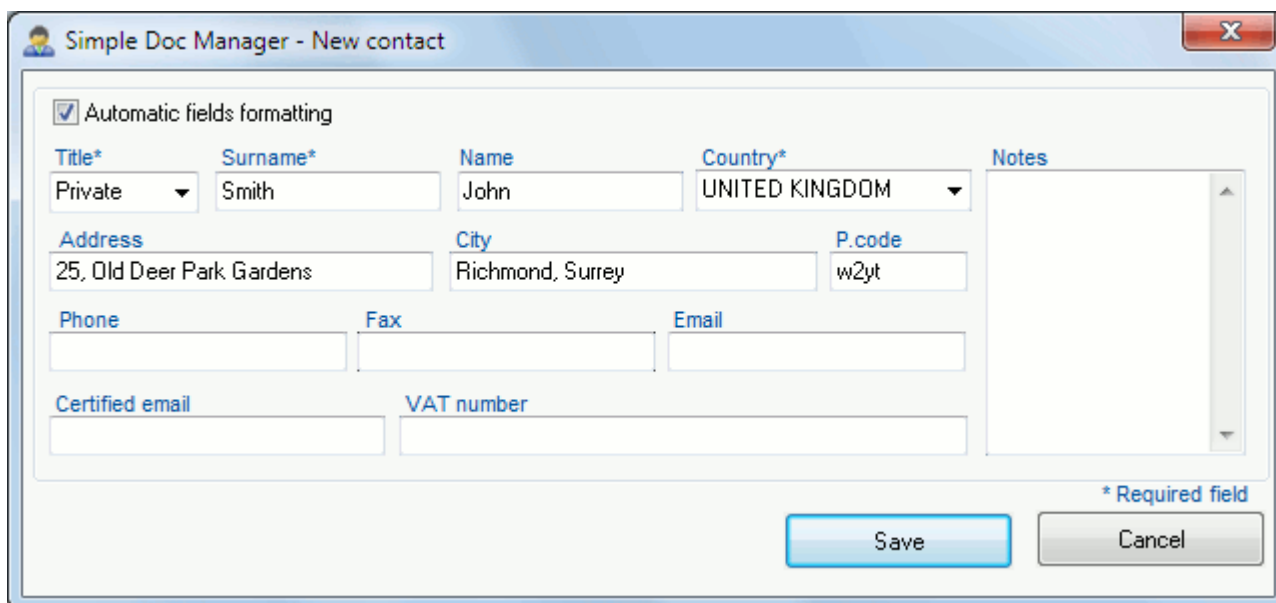
The record number will be automatically generated in increasing mode in regard to the last recorded document (visible after saving).

The record date will also be inserted automatically, but can be modified if needed.

If sender/recipient is not yet in the Address Book, a window will automatically open, asking to insert the new contact:



When clicking on “OK”, another window will appear, allowing you to insert all data for the new contact:



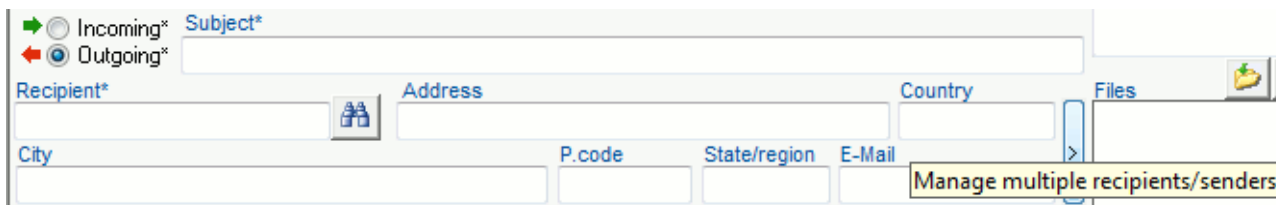
The "Simple Doc Manager - New contact" window contains the following fields and controls:

- ☒ Automatic fields formatting
- Title\***: Private (dropdown)
- Surname\***: Smith
- Name**: John
- Country\***: UNITED KINGDOM (dropdown)
- Notes**: (text area)
- Address**: 25, Old Deer Park Gardens
- City**: Richmond, Surrey
- P.code**: w2yt
- Phone**: (text field)
- Fax**: (text field)
- Email**: (text field)
- Certified email**: (text field)
- VAT number**: (text field)
- \* Required field**: (label)
- Buttons**: Save, Cancel

Upon saving the new contact, all fields of the record for the contact will be automatically filled in.

All saved contacts can be visualized and managed through the **Address book** Window.

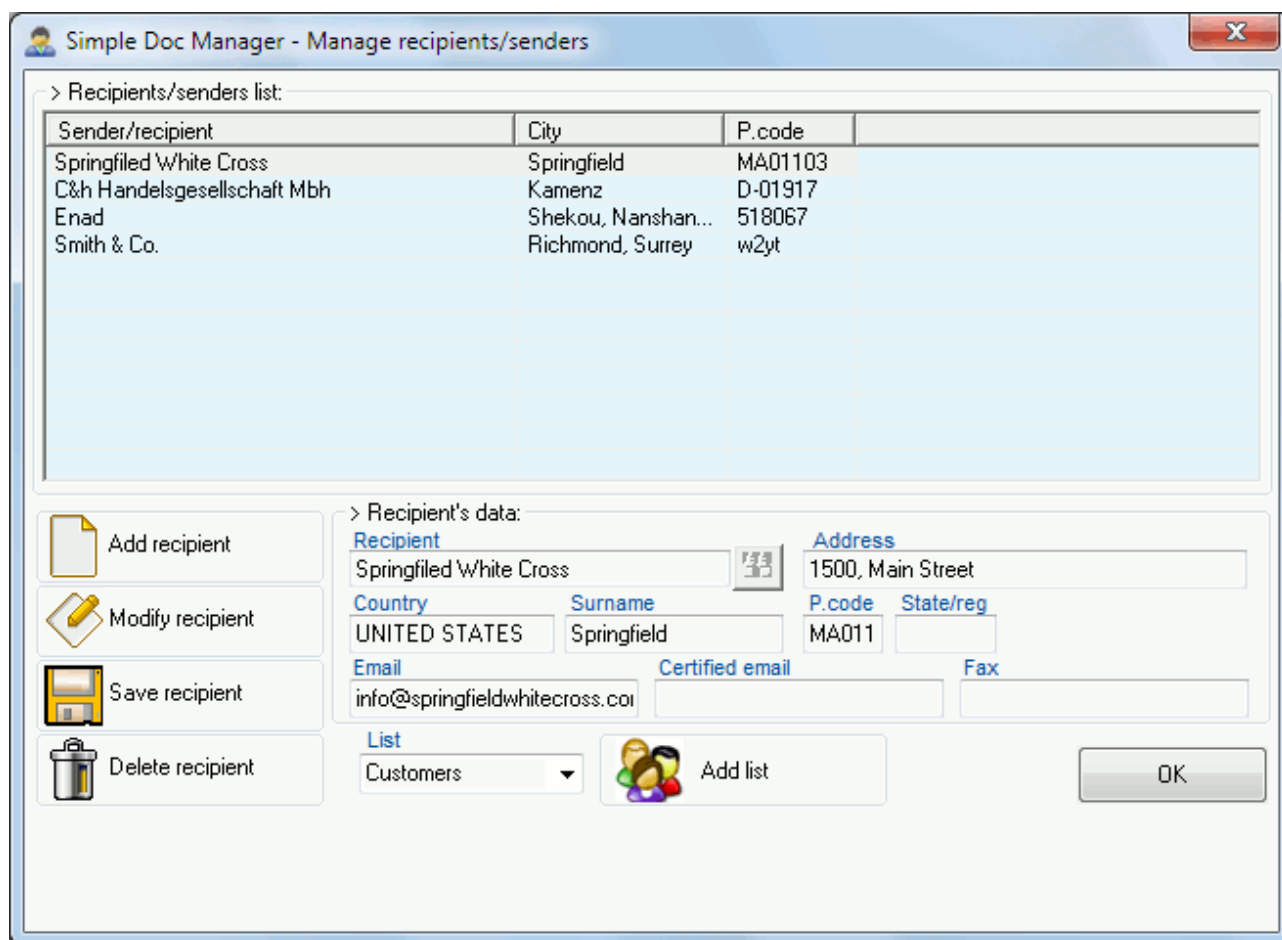
While inputting a new record, on the right of the recipient fields a vertical button will appear.



The "Simple Doc Manager - Address book" window displays a list of contacts with the following fields and controls:

- Incoming\***: (radio button)
- Outgoing\***: (radio button)
- Subject\***: (text field)
- Recipient\***: (text field)
- Address**: (text field)
- Country**: (text field)
- Files**: (icon)
- City**: (text field)
- P.code**: (text field)
- State/region**: (text field)
- E-Mail**: (text field)
- Manage multiple recipients/senders**: (button)





Clicking on this button you will enter a frame where you can manage multiple senders or recipients of a single document:



Simple Doc Manager - Manage recipients/senders

> Recipients/senders list:

Sender/recipient	City	P.code
Springfield White Cross	Springfield	MA01103
C&h Handelsgesellschaft MbH	Kamenz	D-01917
Enad	Shekou, Nanshan...	518067
Smith & Co.	Richmond, Surrey	w2yt

 Add recipient  
 Modify recipient  
 Save recipient  
 Delete recipient

> Recipient's data:


**Recipient**  
 Springfield White Cross

**Address**  
 1500, Main Street

**Country** UNITED STATES **Surname** Springfield **P.code** MA011 **State/reg**

**Email** info@springfieldwhitecross.co.uk **Certified email** **Fax**

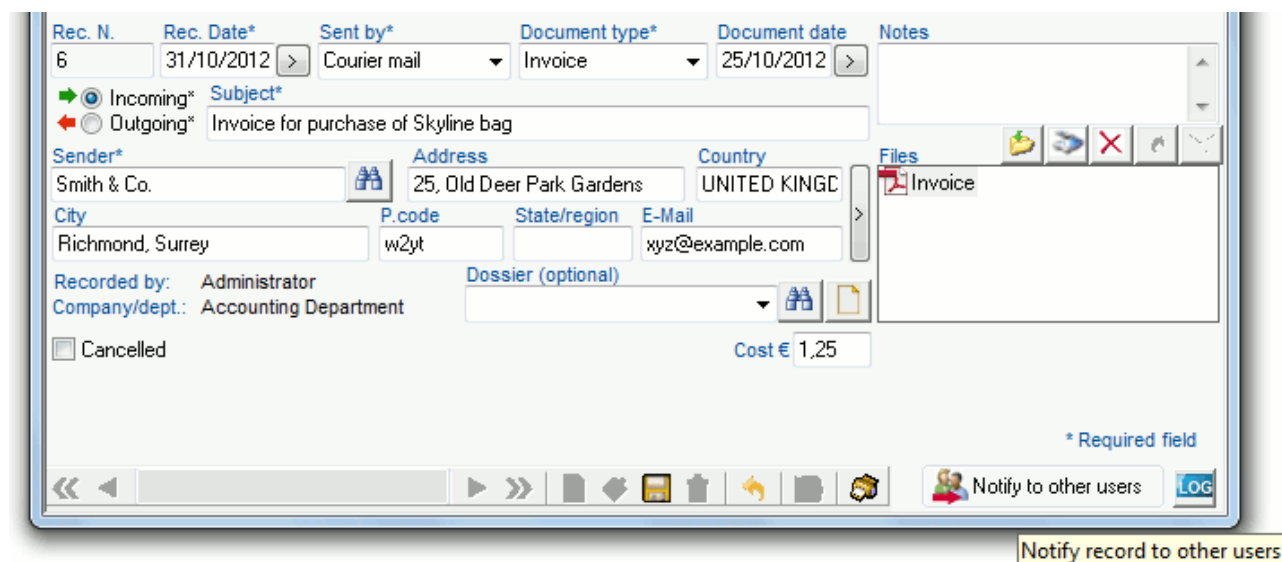
**List**  
 Customers

 Add list

OK

The **Add List** button allows you to input with one click as recipients all contacts previously input in the selected list.

You may also notify the recorded document to other users of the software:



Rec. N. 6 Rec. Date\* 31/10/2012 Sent by\* Courier mail Document type\* Invoice Document date 25/10/2012 Notes

Incoming\* Subject\* Invoice for purchase of Skyline bag

Sender\* Smith & Co. Address 25, Old Deer Park Gardens Country UNITED KINGDOM

City Richmond, Surrey P.code w2yt State/region E-Mail xyz@example.com

Recorded by: Administrator Dossier (optional)

Company/dept.: Accounting Department

☐ Cancelled Cost € 1,25

Files Invoice

Notify to other users

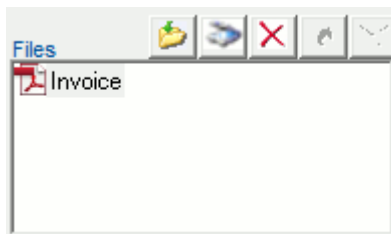
Notify record to other users


For details, see the Notifications Chapter.

## Associating Files to Record

Simple Doc Manager allows you to associate files to a given record.


When in New Record or modification mode, the buttons for management of associated files are activated:




The **Add File** button  allows association of a file, selecting it from a destination. Files can also be associated dragging them into the blank window.

This drag & drop feature is particularly useful when **recording an email**.

An email from any of the major mail clients can be recorded simply dragging it from the email software into the associated files window. All record fields will be automatically filled in with the email data.

The **Add File from Scanner**  button allows association of a file directly from a scanner or another TWAIN source.

With the **Delete File**  button a selected file is deleted.

A link to a file can be enabled from the Options and Utilities form. The  button will be enabled, allowing a link to a file instead of copying it in the software folder.

The **Send email with selected files attached**  button allows sending of selected files as attachments to a new email message, through the pre-set mail client.

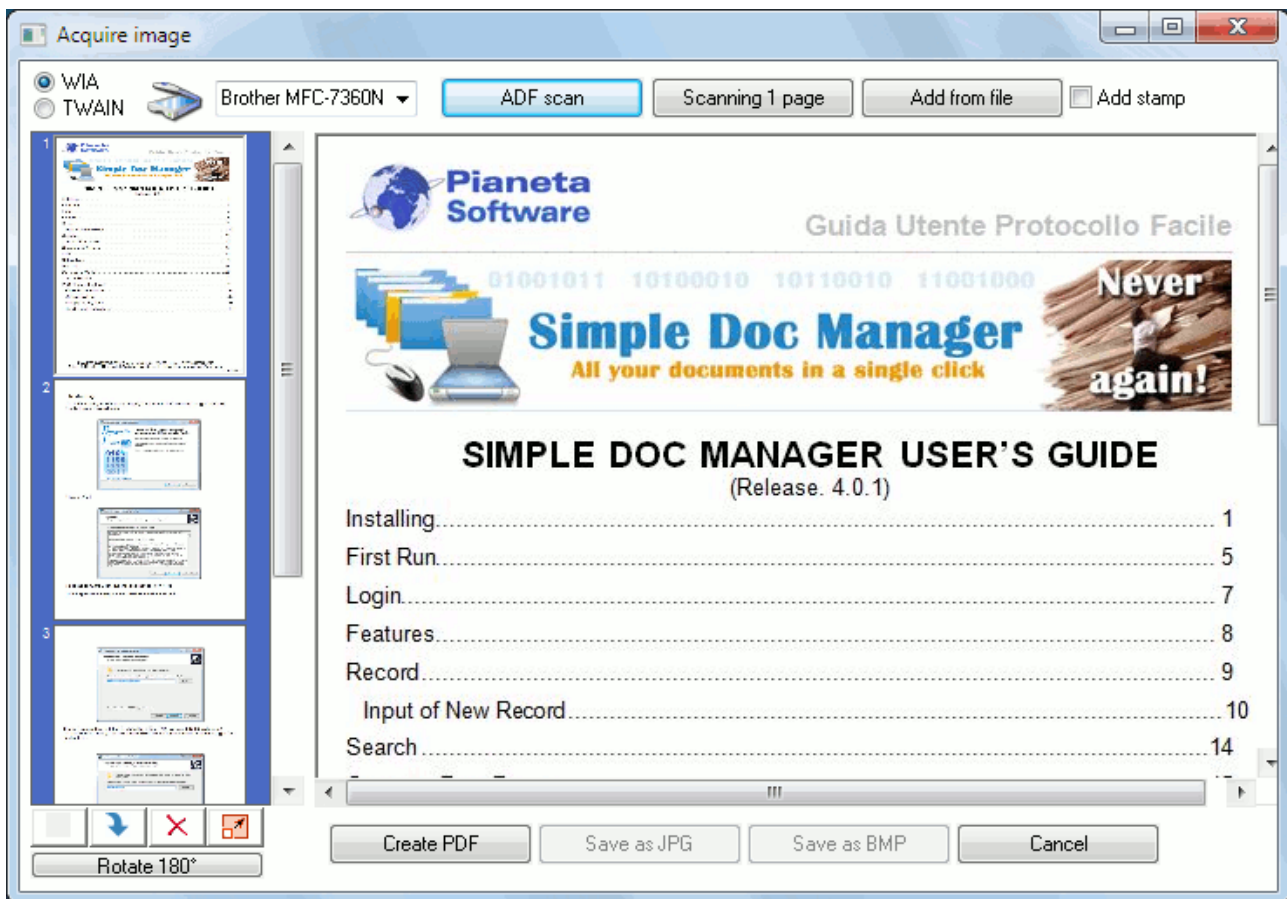
For outgoing records, the message recipient will be automatically set using the email address (or addresses if multiple) chosen for the record.

For incoming messages, it will be possible to add a list of recipients from contacts of the Address Book (useful, for example, for sending an incoming message to a company internal list)

Right-clicking on the Associated Files window, a text menu will open, allowing the input of a dynamic document starting from a pre-set WORD document, which may be defined in the Documents management template.

For further details, see chapter **Documents Models**.

Clicking on the **Add file from scanner** button, the **Import Picture** window will open:



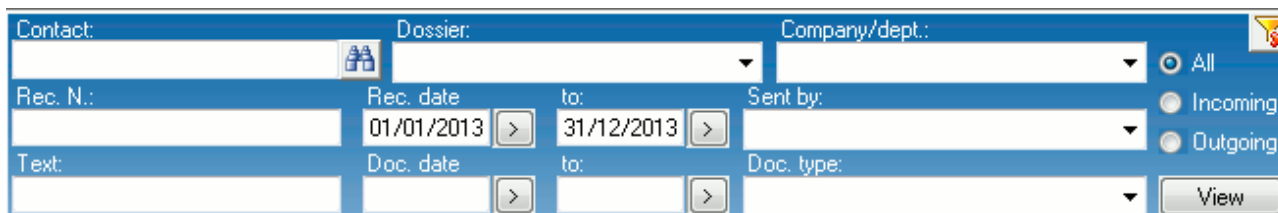
Clicking on the “**TWAIN source**” button, you can choose which scanner to use.  
From this window you can scan paper documents to associate to a record, saving them as images (BPM or JPG) or as PDF.  
You may create a single PDF document with several scanned documents.

Clicking on **Add File** allows you to add a pre-scanned page, previously saved as image file.

The “**Add Stamp**” button simulates a stamp with the date and number of record, which can be dragged with the mouse in the requested spot and will be impressed on the document once the PDF file is created.


## Search

Using the filters on the window top part, you may search input records.

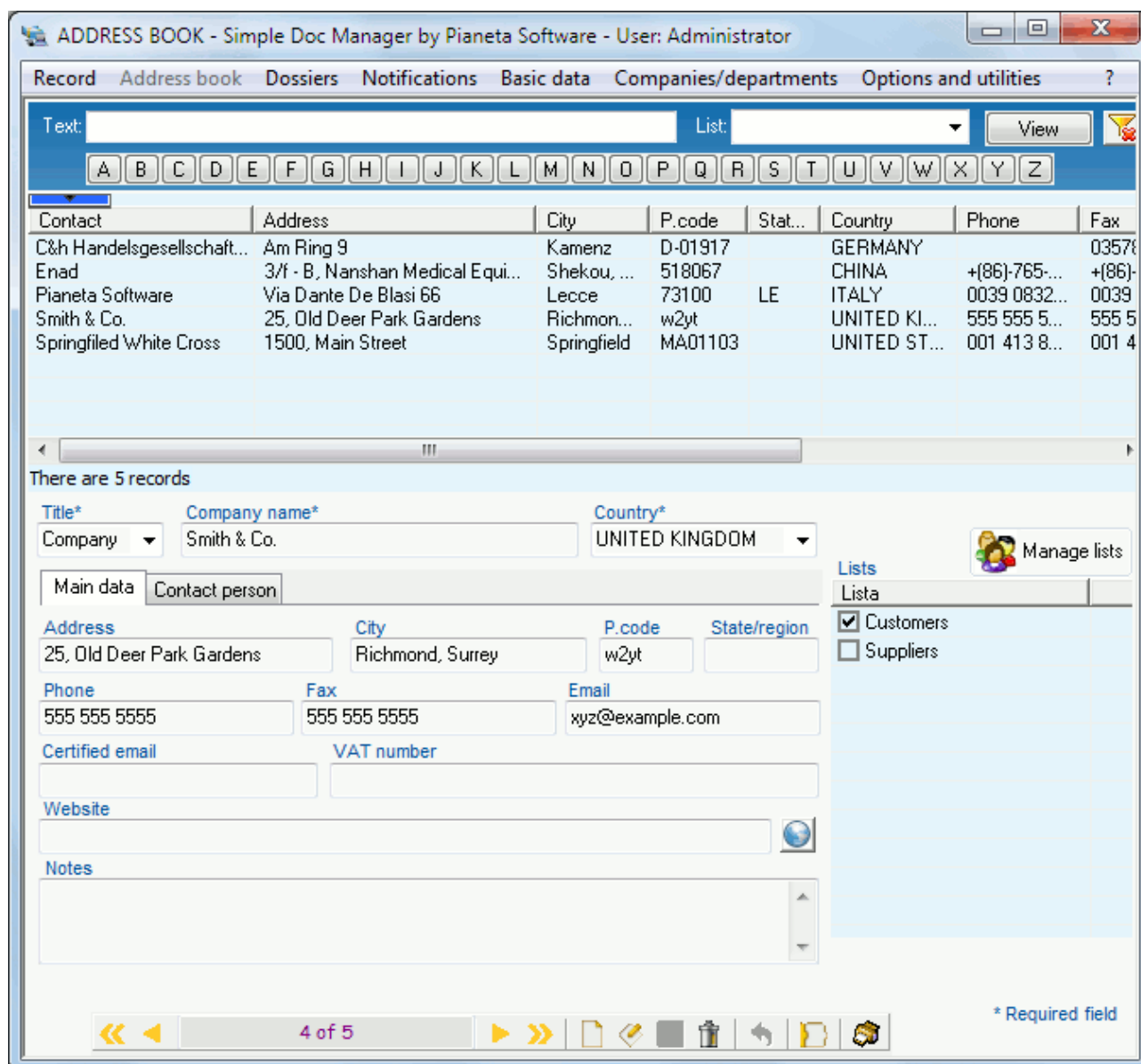


The possible search criteria are as follows:

- Dossier (FULL and PLUS version only)
- Company or department (FULL and PLUS version only and only if more than a company/department is present)
- Record number (use this field for Bar Code search also with related reader, see *Bar Code* chapter)
- Date of Record (a date range can be specified)
- Sent By (choosing from pre-set list)
- Date of Recorded document (a date range can be specified)
- Document Type (choosing from pre-set list)
- Incoming, Outgoing or All
- Free Text. Text inserted here will be searched even partially in all of the following fields: subject, sender, recipient, notes, address, city, state, country)

Using the  button, situated on the upper right corner of this window, all previously set search filters can be cleared.

## Address book



ADDRESS BOOK - Simple Doc Manager by Pianeta Software - User: Administrator

Record Address book Dossiers Notifications Basic data Companies/departments Options and utilities ?

Text: List: View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Contact	Address	City	P.code	Stat...	Country	Phone	Fax
C&h Handelsgesellschaft...	Am Ring 9	Kamenz	D-01917		GERMANY		03578
Enad	3/f - B, Nanshan Medical Equi...	Shekou, ...	518067		CHINA	+(86)-765-...	+(86)-
Pianeta Software	Via Dante De Blasi 66	Lecce	73100	LE	ITALY	0039 0832...	0039
Smith & Co.	25, Old Deer Park Gardens	Richmon...	w2yt		UNITED KI...	555 555 5...	555 5
Springfield White Cross	1500, Main Street	Springfield	MA01103		UNITED ST...	001 413 8...	001 4

There are 5 records

Title\* Company name\* Country\*

Company Smith & Co. UNITED KINGDOM

Main data Contact person

Address City P.code State/region

25, Old Deer Park Gardens Richmond, Surrey w2yt

Phone Fax Email

555 555 5555 555 555 5555 xyz@example.com

Certified email VAT number

Website

Notes

Lists

Lista

☒ Customers

☐ Suppliers

Manage lists

4 of 5


\* Required field

From the Address Book form you can view a list of all memorized contacts, which can be managed through the navigation bar at the bottom.

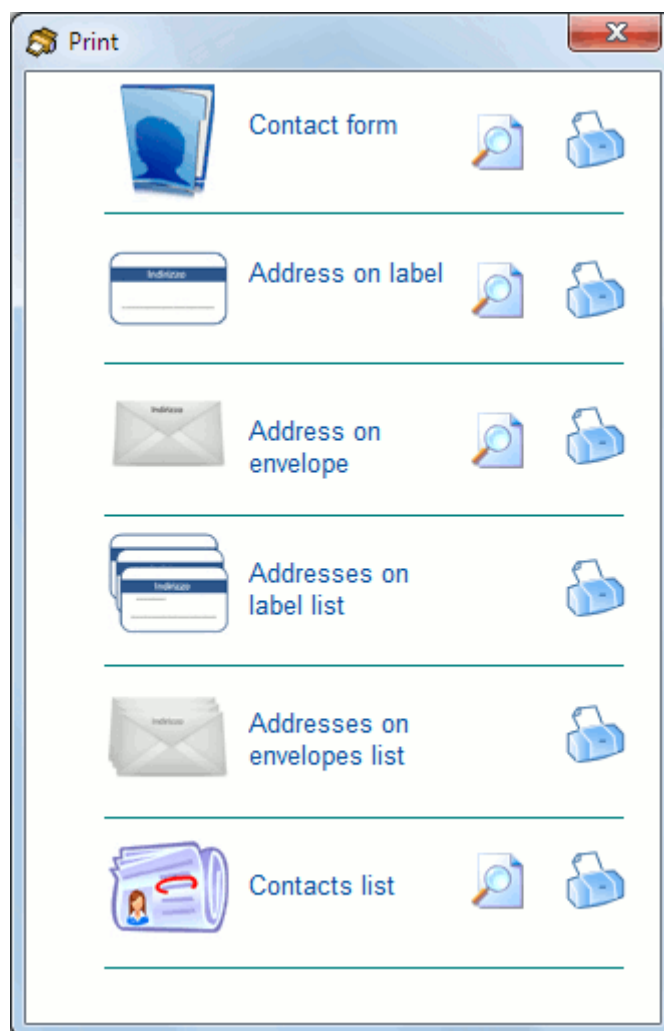
The Address Book is divided in two different forms:

- **General** containing all contacts' main data
- **Contact Person** containing all data for contact person

You may also create lists of contacts, to be used for forwarding a document to all contacts. For outgoing records, it will be possible to choose a complete list; all contacts herewith contained will be added in the recipients field.

Clicking on Print  you may choose to print:

- The Contact Form
- A label with the contact's address (to be stuck to envelope)
- The contact's address directly on the envelope
- The whole visualized list on labels
- The whole visualized list on envelopes
- The entire contacts list in A4 format

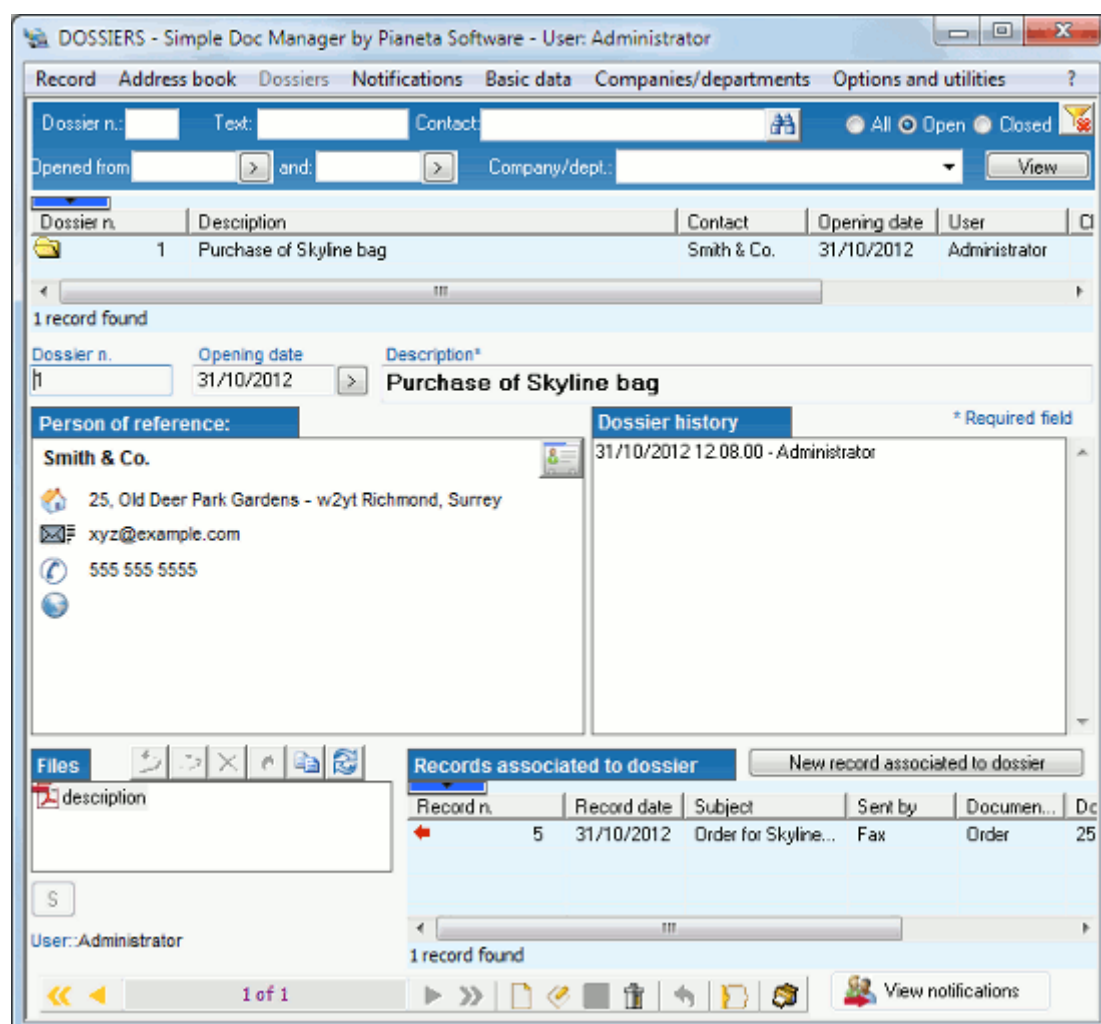




## Dossiers

From the 2.2.2 release of the software, the dossier management feature was introduced (available in Full version only)

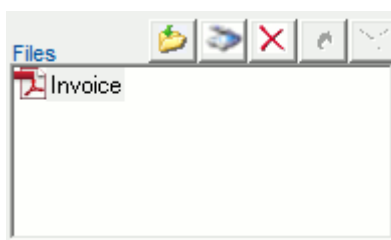
You may associate to each dossier one or more recorded documents, attach files which are not necessarily recorded and keep track of a certain number of text info with date, time and name of user who originally input records.



To open a new dossier, click on the “New Record” icon .

The field **Add Note to Dossier** will appear, allowing you to save different text info related to the dossier. The software will automatically insert date and time and name of User who input documents.

Using the box on the right, you may associate to each dossier any type of file or document acquired with a scanner:



To associate a new file, click on the yellow icon (folder with an arrow). A window will open, allowing you to select a file from any path on your computer or a shared net folder.

The selected file will be automatically copied in a dossier associated folder and will remain linked to it.

Clicking on the scanner icon, you may start scanning a paper document directly from the software.

The scanned file will also be automatically saved in the current dossier associated folder.

From the Options and Utilities form you may enable links to files. A button will be enabled, allowing creation of a link to a file instead of copying it in a folder of the software.

If you need to add notes to a saved dossier, you only have to click on *Modify Record* and write the new note in the **Add Note to Dossier** window.

The typed text will be added in the **Dossier History** box, together with date and time of input and name of user.

This way you will have a complete and neat picture of the dossier: you may know who did what and when.

To associate the dossier to a different user, you only need to double-click on the original user's name and then select a different user to whom to associate it.

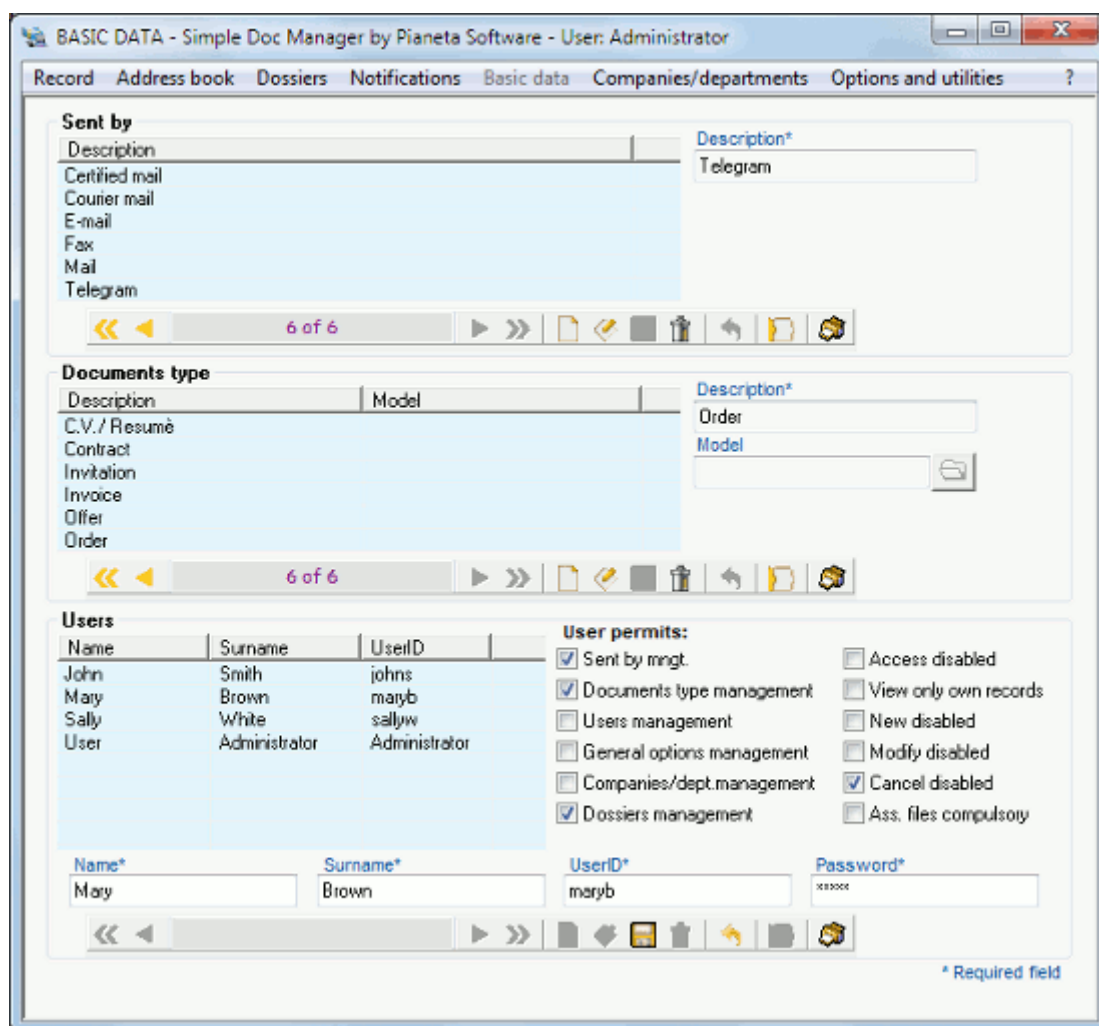
At the bottom of the window you will find a list of records associated to the dossier.

To associate a record to the dossier use the special selection box in the record management section.

Clicking on Print  you may choose to print::

- a list of viewed dossiers
- a list of the viewed dossiers including Dossier History
- details of current dossier

## Basic data



**BASIC DATA - Simple Doc Manager by Pianeta Software - User: Administrator**

Record Address book Dossiers Notifications Basic data Companies/departments Options and utilities ?

**Sent by**

Description	Description*
Certified mail	Telegram
Courier mail	
E-mail	
Fax	
Mail	
Telegram	

6 of 6

**Documents type**

Description	Model	Description*
C.V./ Resumé		Order
Contract		Model
Invitation		
Invoice		
Offer		
Order		

6 of 6

**Users**

Name	Surname	UserID
John	Smith	johns
Mary	Brown	maryb
Sally	White	sallyw
User	Administrator	Administrator

**User permits:**

- ☒ Sent by mngt.
- ☒ Documents type management
- ☐ Users management
- ☐ General options management
- ☐ Companies/dept.management
- ☒ Dossiers management
- ☐ Access disabled
- ☐ View only own records
- ☐ New disabled
- ☐ Modify disabled
- ☒ Cancel disabled
- ☐ Ass. files compulsory

**Name\*** Mary **Surname\*** Brown **UserID\*** maryb **Password\*** x00000

\* Required field

From the Basic Data form you may personalize all documents and correspondence types, and manage users with access to the software.

You may even predefine a pre-set model (eg. A standard Word file) which may be recalled from the menu, opening when right-clicking on the associated files list of a record.

For each user you may set the following permits:

1. Users Management

If this box is checked, the user has permission to create new users or modify existing ones. We advise to allow this permit to the Administrator only.

If this box is not checked, the user will still be allowed to modify his personal password to access the software.

2. Document Type Management

If this box is checked, user may create new document types or modify existing ones.

3. Sent By Management

If this box is checked, user may create new types of correspondence or modify existing ones.

4. Dossiers Management

If this box is checked, user may open new dossiers or modify existing ones.

5. Company/Departments Management

If this box is checked, user may create new companies or departments or modify existing ones.

6. Options and Utilities Management

If this box is checked, user may set the software options and use Utilities.

7. Access Disabled

Checking this box, access to the software by this user is disabled.

8. View Own Records only

If this box is checked, user may only view documents he recorded.

9. Disable New

If this box is checked, user will not be allowed to input new records, contacts, document types, correspondence types or dossiers.

10. Disable modify

If this box is checked, user will not be allowed to modify records, contacts, document types, correspondence types or dossiers

11. Compulsory File Association

If this box is checked, user may compulsory associate a file to records he creates.

12. Header Management (Plus version only)

If this box is checked, user may manage headings and classifications, creating or modifying headings, class and subclass

13. Compulsory Header (Plus version only)

If this box is checked, user must compulsory classify under heading records he creates.

14. Header Compulsory (Plus version only)

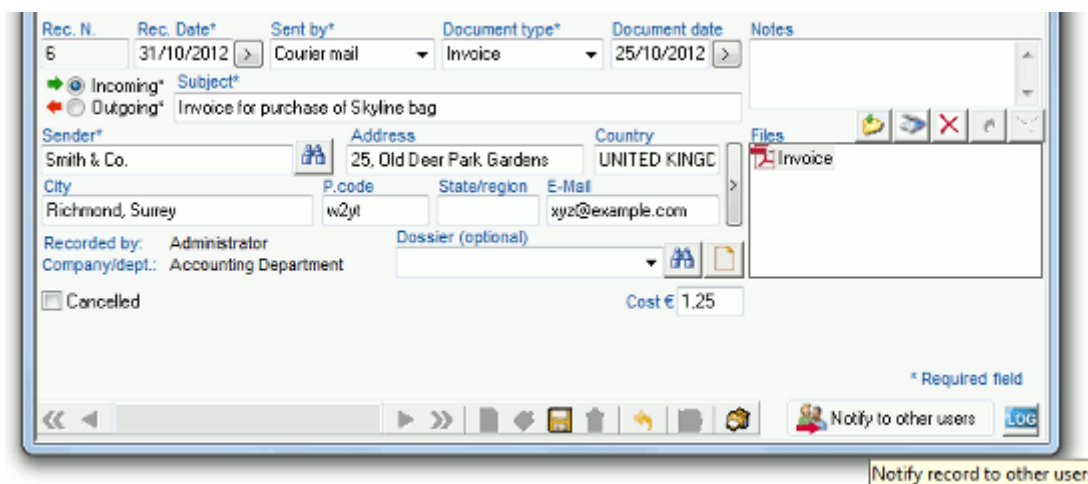
If this box is checked, user must compulsory classify records as per header.

## Notifications

You may notify a recorded document or a complete dossier to other users to bring it to their attention.

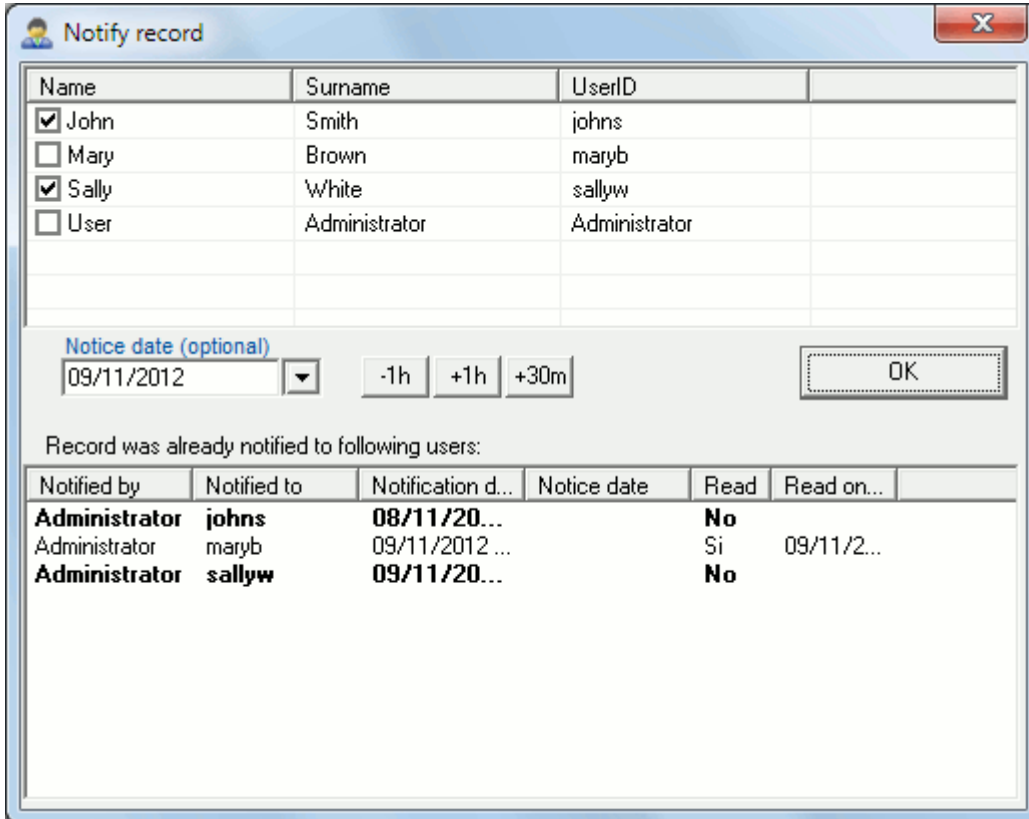
This allows a better organization of work inside your company and sorting all incoming documents to whom it may concern.

While inputting data of a certain record or dossier, the “Notify to other users” button will appear.



The screenshot shows a software window for entering document data. At the top, there are tabs for 'Incoming' and 'Outgoing'. The 'Incoming' tab is active, showing a form with the following fields: 'Rec. N' (6), 'Rec. Date' (31/10/2012), 'Sent by' (Courier mail), 'Document type' (Invoice), 'Document date' (25/10/2012), 'Notes', 'Subject' (Invoice for purchase of Skyline bag), 'Sender' (Smith & Co.), 'Address' (25, Old Deer Park Gardens), 'Country' (UNITED KINGDOM), 'City' (Richmond, Surrey), 'P.code' (w2j1), 'State/region', 'E-Mail' (xyz@example.com), 'Recorded by' (Administrator), 'Company/dept.' (Accounting Department), 'Dossier (optional)', and 'Cost' (€ 1,25). A 'Notify to other users' button is located at the bottom right of the form. A tooltip 'Notify record to other users' is visible below the button.

Clicking on this button you will be taken to a template allowing you to notify documents or dossier to other users:



**Notify record**

Name	Surname	UserID
<input checked="" type="checkbox"/> John	Smith	johns
<input type="checkbox"/> Mary	Brown	maryb
<input checked="" type="checkbox"/> Sally	White	sallyw
<input type="checkbox"/> User	Administrator	Administrator

Notice date (optional)  
 09/11/2012 ▼ -1h +1h +30m OK

Record was already notified to following users:

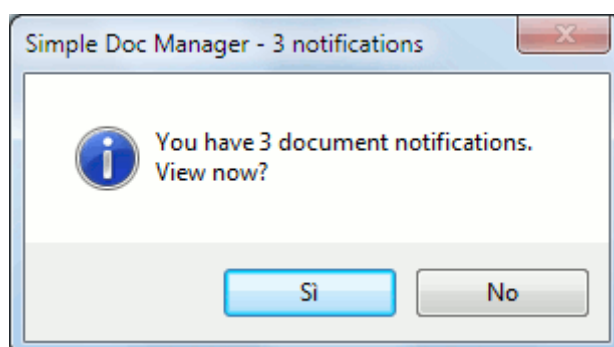
Notified by	Notified to	Notification d...	Notice date	Read	Read on...
Administrator	johns	08/11/20...		No	
Administrator	maryb	09/11/2012 ...		Si	09/11/2...
Administrator	sallyw	09/11/20...		No	

To notify other users all you need to do is select user or users from this list.

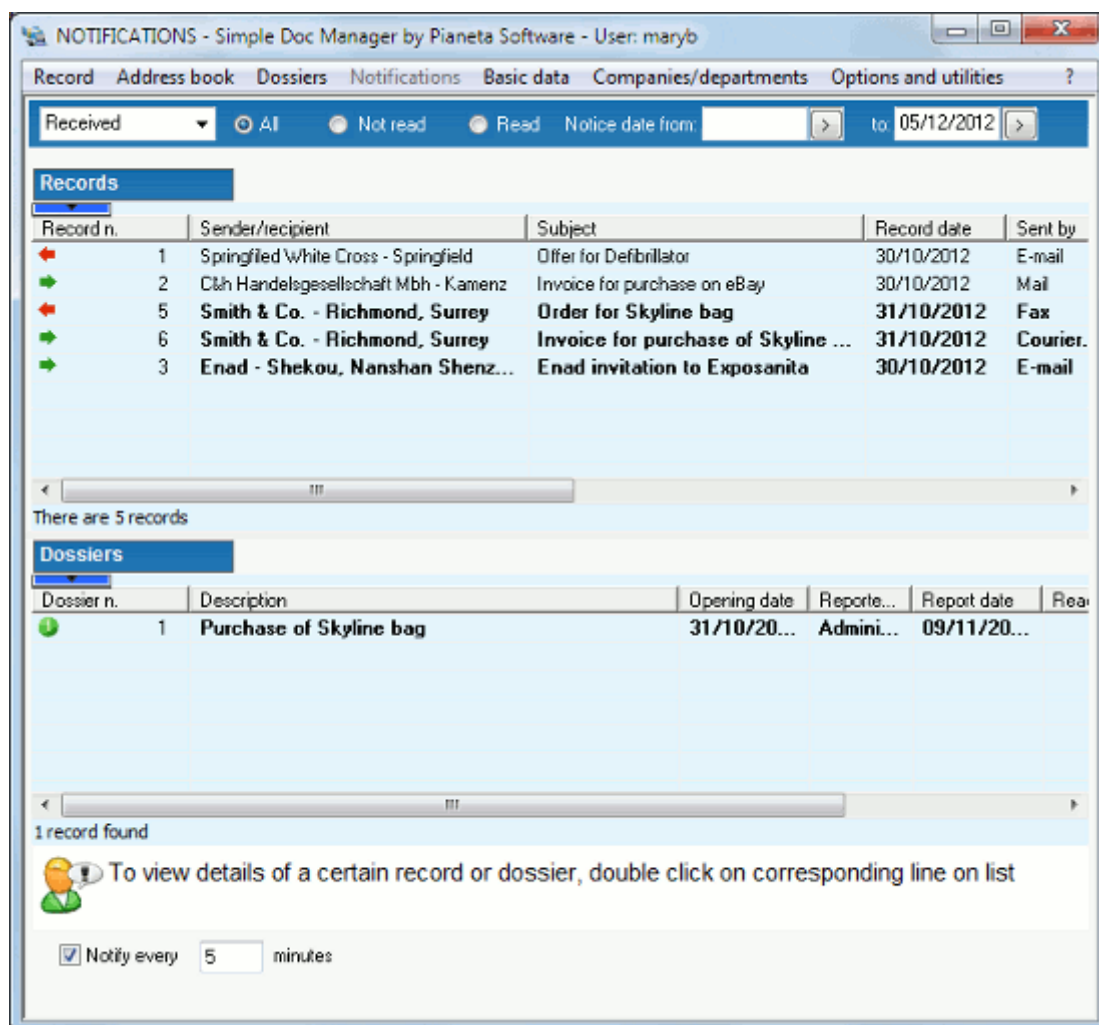
You may also notify documents to users who will not be allowed to view them since not enabled for such department or because they can only view their own, allowing them to manage this document anyway.

If required, you may also specify a date or even a time of notice.

When a user enters the software, if he has not yet read notifications, a message of alert will appear, informing of new notifications:



Clicking on "Yes" the software will show the *Notifications* window.



To view a record or dossier details, double-click on the related line on the list.

If you wish to mark an already read document as "Not Read", you only need to select it from the list and click on the *"Mark as Not Read"* button.

In the bottom left corner you may decide whether you wish to have an automatic alert for received notifications and minute span.

To view the sent notifications status and know who has read the notified documents and how many are still to be read, you just have to select **Sent** from the Drop-down menu in the left top corner



NOTIFICATIONS - Simple Doc Manager by Pianeta Software - User: Administrator

Record Address book Dossiers Notifications Basic data Companies/departments Options and utilities ?

Sent ☐ All ☐ Not read ☐ Read Notice date from:  to: 05/12/2012

**Records**


Record n.	Reported to:	Report date	Sender/recipient	Subject
1	sallyw	09/11/201...	Springfield White Cross - Spring...	Offer for Defibrillator
1	maryb	09/11/2012 ...	Springfield White Cross - Springfield	Offer for Defibrillator
2	sallyw	09/11/201...	C&H Handelsgesellschaft MbH - ...	Invoice for purchase on e
2	maryb	09/11/2012 ...	C&H Handelsgesellschaft MbH - Kamenz	Invoice for purchase on eBay
5	sallyw	09/11/201...	Smith & Co. - Richmond, Surrey	Order for Skyline bag
5	maryb	09/11/201...	Smith & Co. - Richmond, Surrey	Order for Skyline bag
6	sallyw	09/11/201...	Smith & Co. - Richmond, Surrey	Invoice for purchase of SI
6	maryb	09/11/201...	Smith & Co. - Richmond, Surrey	Invoice for purchase of SI

There are 12 records Divide in pages »

**Dossiers**

Dossier n.	Reporte...	Description	Opening date	Report date	Rea
1	johns	Purchase of Skyline bag	31/10/20...	09/11/20...	
1	sallyw	Purchase of Skyline bag	31/10/20...	09/11/20...	
1	maryb	Purchase of Skyline bag	31/10/20...	09/11/20...	
1	Administ...	Purchase of Skyline bag	31/10/2012	09/11/2012...	09/1

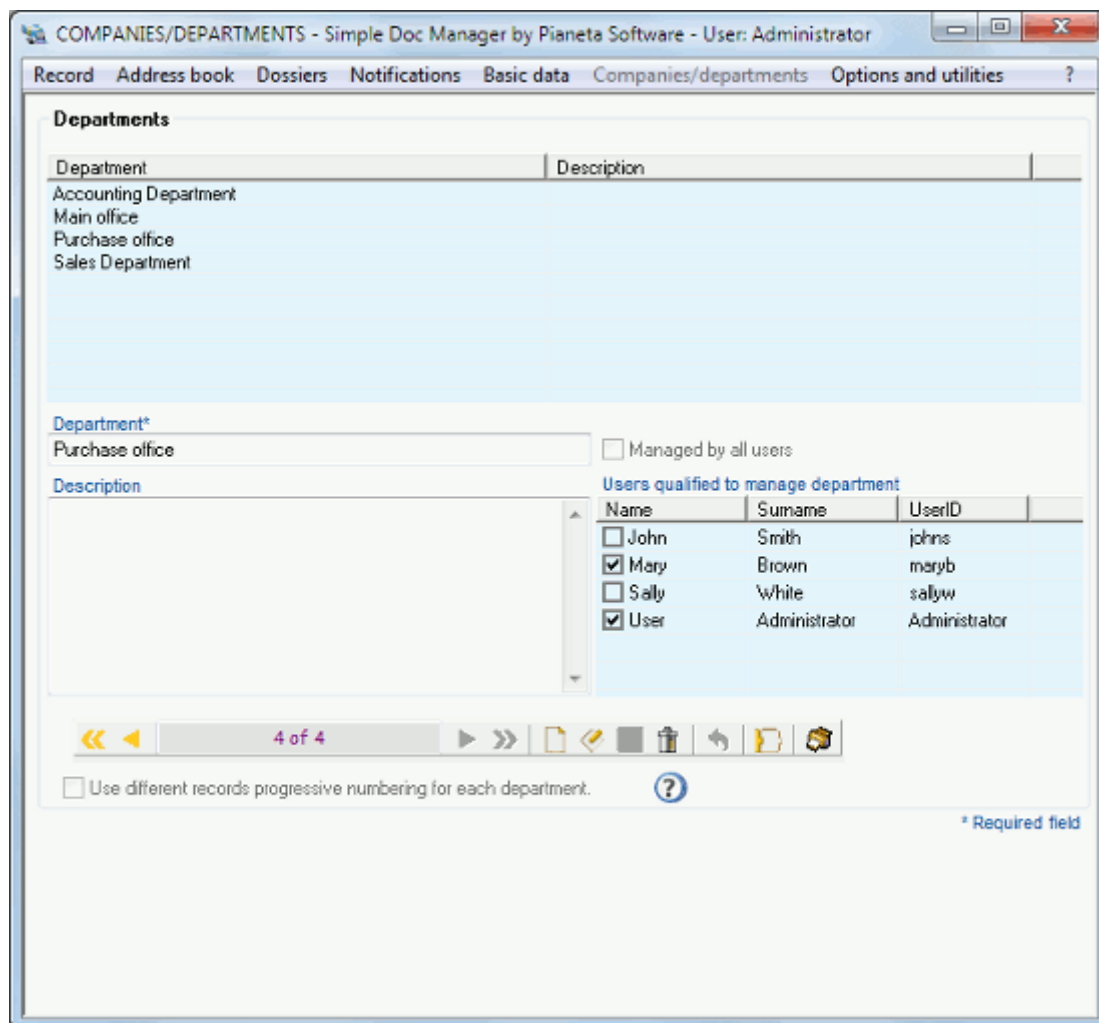
There are 4 records

 To view details of a certain record or dossier, double click on corresponding line on list

☐ Notify every  minutes



## Companies/Departments



COMPANIES/DEPARTMENTS - Simple Doc Manager by Pianeta Software - User: Administrator

Record Address book Dossiers Notifications Basic data Companies/departments Options and utilities ?

**Departments**

Department	Description
Accounting Department	
Main office	
Purchase office	
Sales Department	

Department\*  
Purchase office

Description

☐ Managed by all users

Users qualified to manage department

Name	Surname	UserID
<input type="checkbox"/> John	Smith	johns
<input checked="" type="checkbox"/> Mary	Brown	maryb
<input type="checkbox"/> Sally	White	sallyw
<input checked="" type="checkbox"/> User	Administrator	Administrator

4 of 4

☐ Use different records progressive numbering for each department. ?

\* Required field

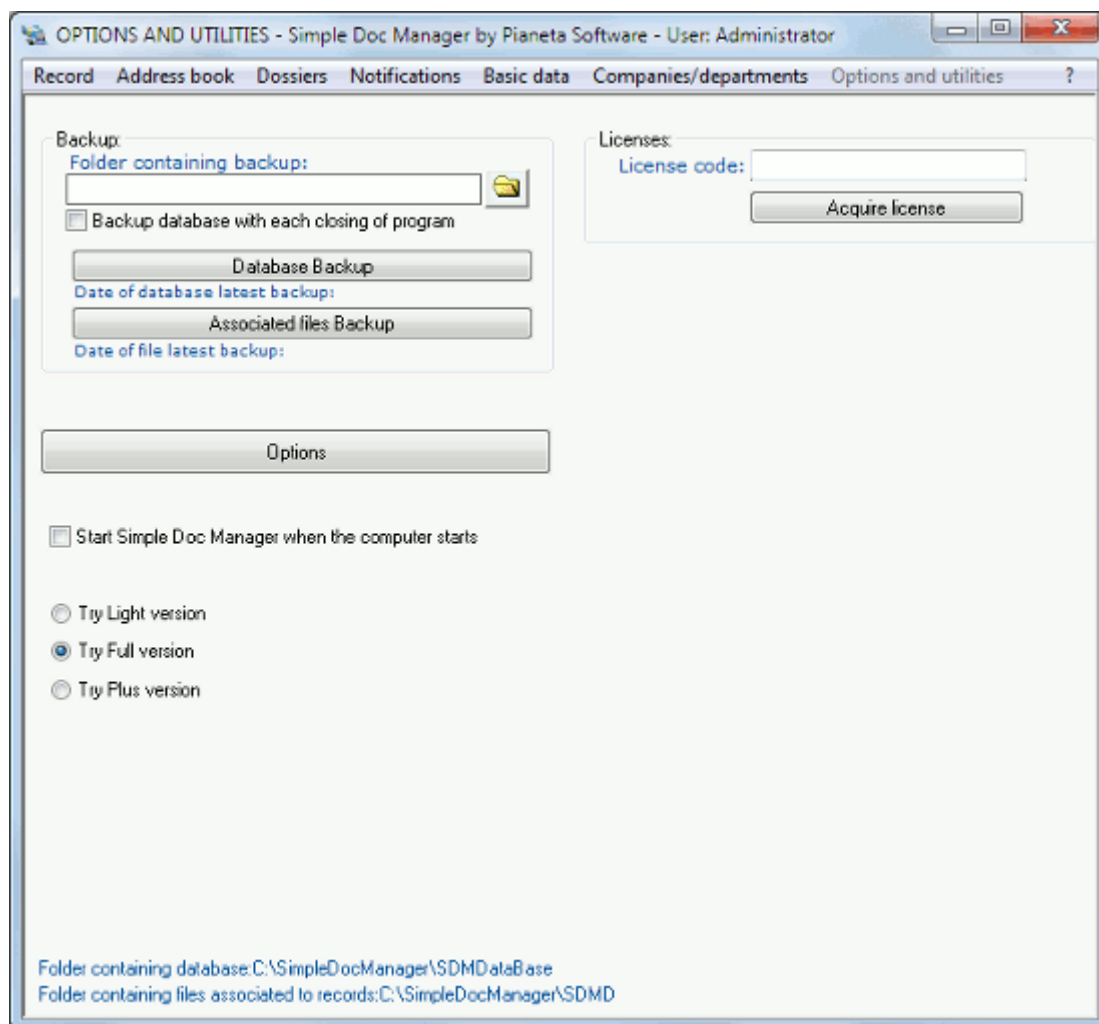
With the Full version of the software, you may divide records by company or department of the same company.

Companies and departments are managed from the Companies/Departments form. A different record numbering may be given for each company or department.

You may choose if all users or just some may manage each company or department .

This way, users qualified for management of certain departments, will not see documents recorded in departments to which they have no access and will not be allowed to record documents in such departments.

## Options and Utilities



The Options and Utilities form manages different functions:

- **Backup**

To perform the data backup you need to select the folder which will contain the backup and subsequently click:

- on the "Database Backup" button, to backup the database only
  - on the "Associate files backup", to backup files associated to recorded documents.
- You may also choose, checking the related box, to perform backup every time the software is closed (recommended!).

Warning! Automatic backup will only make a copy of the database.

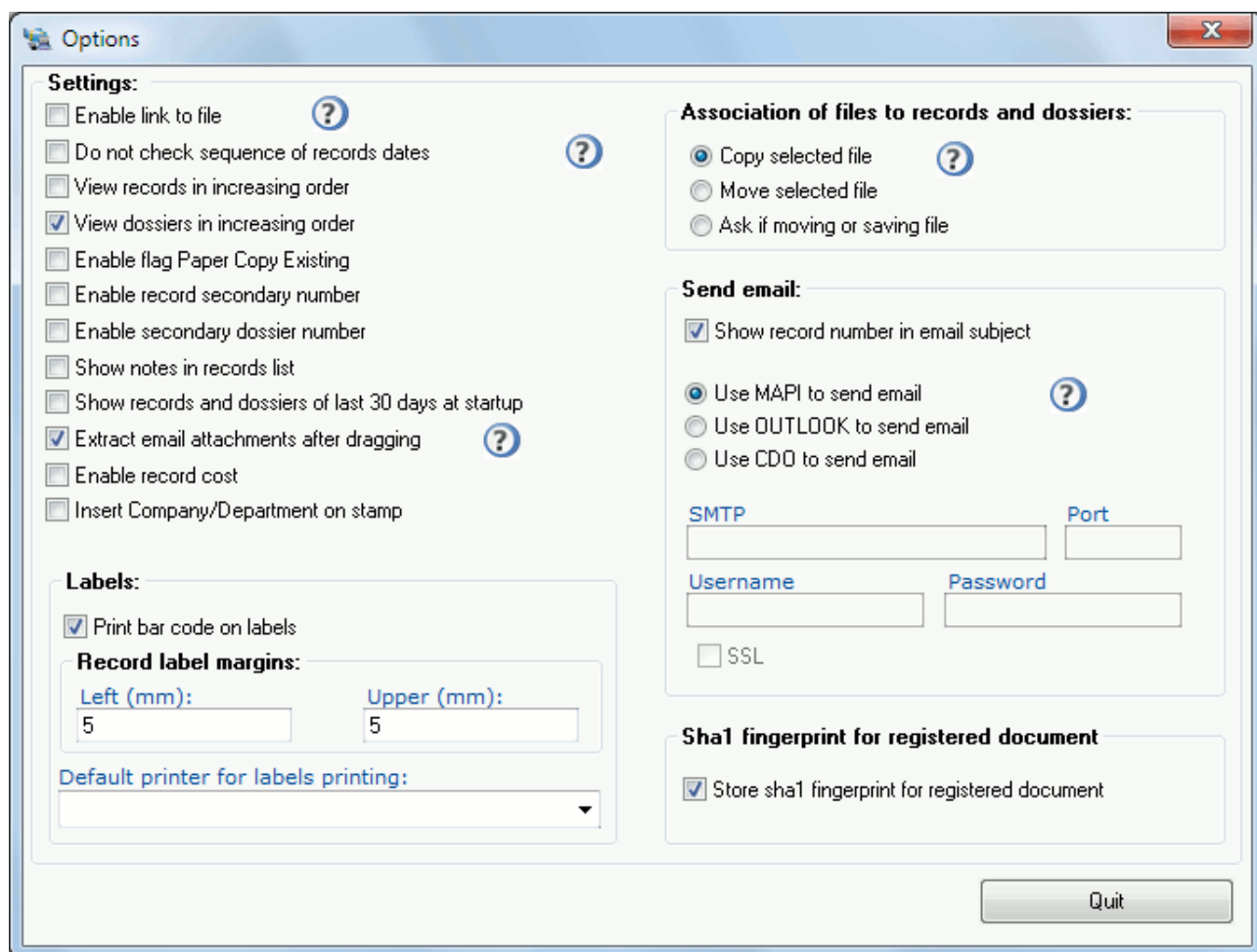
To make a copy of all associated files you must click on the previously described button.

- **Licenses**

Used to register your software or make changes to your license.

- **Options**

Opens a template where you may set the software options.



The screenshot shows the 'Options' dialog box with the following sections:

- Settings:**
  - ☐ Enable link to file
  - ☐ Do not check sequence of records dates
  - ☐ View records in increasing order
  - ☒ View dossiers in increasing order
  - ☐ Enable flag Paper Copy Existing
  - ☐ Enable record secondary number
  - ☐ Enable secondary dossier number
  - ☐ Show notes in records list
  - ☐ Show records and dossiers of last 30 days at startup
  - ☒ Extract email attachments after dragging
  - ☐ Enable record cost
  - ☐ Insert Company/Department on stamp
- Labels:**
  - ☒ Print bar code on labels
  - Record label margins:**
    - Left (mm):
    - Upper (mm):
  - Default printer for labels printing:
- Association of files to records and dossiers:**
  - ☒ Copy selected file
  - ☐ Move selected file
  - ☐ Ask if moving or saving file
- Send email:**
  - ☒ Show record number in email subject
  - ☒ Use MAPI to send email
  - ☐ Use OUTLOOK to send email
  - ☐ Use CDO to send email
  - SMTP:  Port:
  - Username:  Password:
  - ☐ SSL
- Sha1 fingerprint for registered document**
  - ☒ Store sha1 fingerprint for registered document

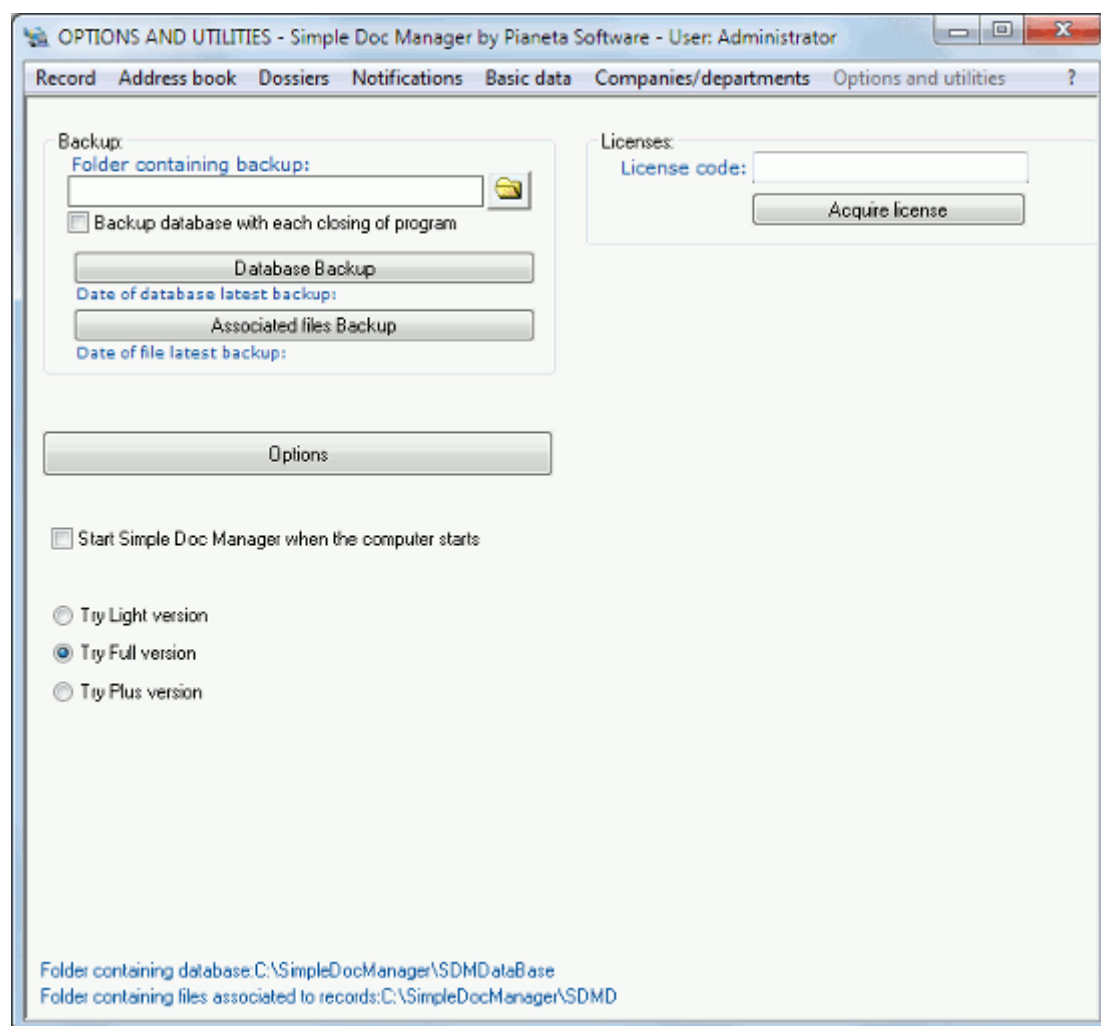
A 'Quit' button is located at the bottom right of the dialog.

For details, click on the question mark icons.

At the bottom of the template you may see the path where files associated to recorded documents are saved. To perform a backup, you will only need to copy this folder and the Database folder of the software installation folder, or use the special function in Utilities.

## Software Registration

To fully use “Simple Doc Manager” you must register first.



OPTIONS AND UTILITIES - Simple Doc Manager by Pianeta Software - User: Administrator

Record Address book Dossiers Notifications Basic data Companies/departments Options and utilities ?

Backup:

Folder containing backup:

☐ Backup database with each closing of program

Database Backup

Date of database latest backup:

Associated files Backup

Date of file latest backup:

Options

Licenses:

License code:

Acquire license

☐ Start Simple Doc Manager when the computer starts

☐ Try Light version

☒ Try Full version

☐ Try Plus version

Folder containing database: C:\SimpleDocManager\SDMDaBaSe  
Folder containing files associated to records: C:\SimpleDocManager\SDMD

To register your software, you need to input, in the requested field, the license number you received via email after purchase and then click on “Acquire license”

## Bar Code

With the software Full version you may also print on labels a bar code identifying the record.



The label bar code print is set from the **Options and Utilities** form, checking the box *Print Bar Code on Label*.

If you have a Bar Code reader, you may then get back to the record by simply scanning the bar code printed on the label. All data related to the record will be shown.

## Document Models

For each document type, you may create a model to add and personalize while recording. If the model is created using Microsoft Word, you may also add fields which will be automatically filled in by the software.

For instance, you may create a model for quotations, including data of the customer, date of document, subject and record number.

This model must then be associated to type of document "quotation", in the data base.

Before even creating the quotation, you then start recording it with Simple Doc Manager, you select Quotation as type of document, Customer, subject, then right-click on the blank box on the right of associated files, then select from menu "model".

The model you previously created will be automatically associated to the record, all contact data, subject, record number previously input will be inserted in the model accordingly and file will be opened in Word to allow you to input the quotation further details. At this point your document will be already recorded and ready to be sent to the customer.

Let see now how to create the Word document which will allow automatic input of various fields.

To do that, you must input bookmarks in the exact position where you like to view the record data. For example, if you want to view the record number, you must input a bookmark with name RecNumber.

To input a Bookmark in a Word document you must place your cursor where you wish to insert the bookmark or highlight the text you wish to replace, then click on menu Insert→Bookmark then type the bookmark name.

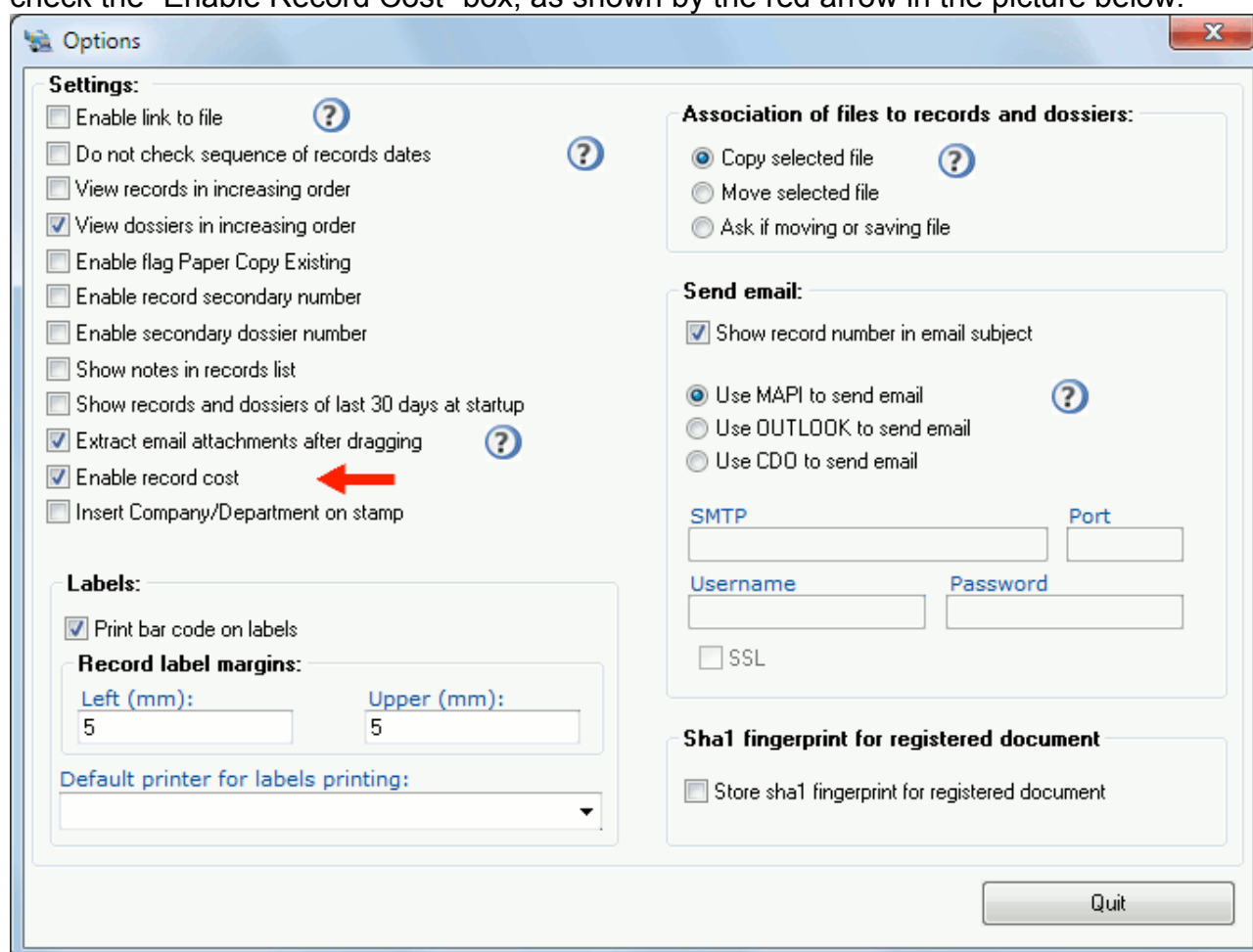
The bookmarks should be named::

- **RecordN** for the record number
- **RecordDate** for the Record Date
- **SentBy** for correspondence type
- **DocumentType** for the type of document
- **RecordDate** for date of the recorded document
- **Notes** for notes
- **IncomingOutgoing** for incoming or outgoing
- **Subject** for the record subject
- **SenderRecipient** for name of sender or recipient
- **Address** for address of sender or recipient
- **Country** for country of sender or recipient
- **City** for city of sender or recipient
- **AreaCode** for Area Code of sender or recipient
- **StateRegion** for state of sender or recipient
- **Contacts** for the complete list of recipients, including address
- **Dossier** for dossier associated to record
- **DossierN** for dossier number associated to record
- **SecondaryDossierN** for dossier secondary number associated to record
- **User** for user which recorded document
- **DocumentProgN** for the progressive number of records of the same document type
- **Department.** for company or department of record
- **DepartmentDescription** for description of company or department of record
- **SecondaryRecordN** for the record secondary number
- **Cost** for the cost of record
- **BarCode** for barcode identifying the record
- **ContactNotes** for notes on the contact associated to record
- **Email** for email of sender or recipient
- **Phone** for telephone number of sender or recipient
- **Fax** for fax number of sender or recipient
- **CertifiedMail** for certified mail address of sender or recipient
- **CodFiscale** for codice fiscale of sender or recipient
- **VATNumber** for VAT number of sender or recipient
- **SecondaryDossierN** for a dossier secondary number

## Cost of Records

Simple Doc Manager gives you the option of calculating the cost of a record (stamps, envelope, paper, etc.), in order to calculate the final cost of a selection of records.

The box Cost of Record, disabled by default, may be enabled in the Software Options; check the "Enable Record Cost" box, as shown by the red arrow in the picture below.



In the record management screen, you will then get a Cost field:

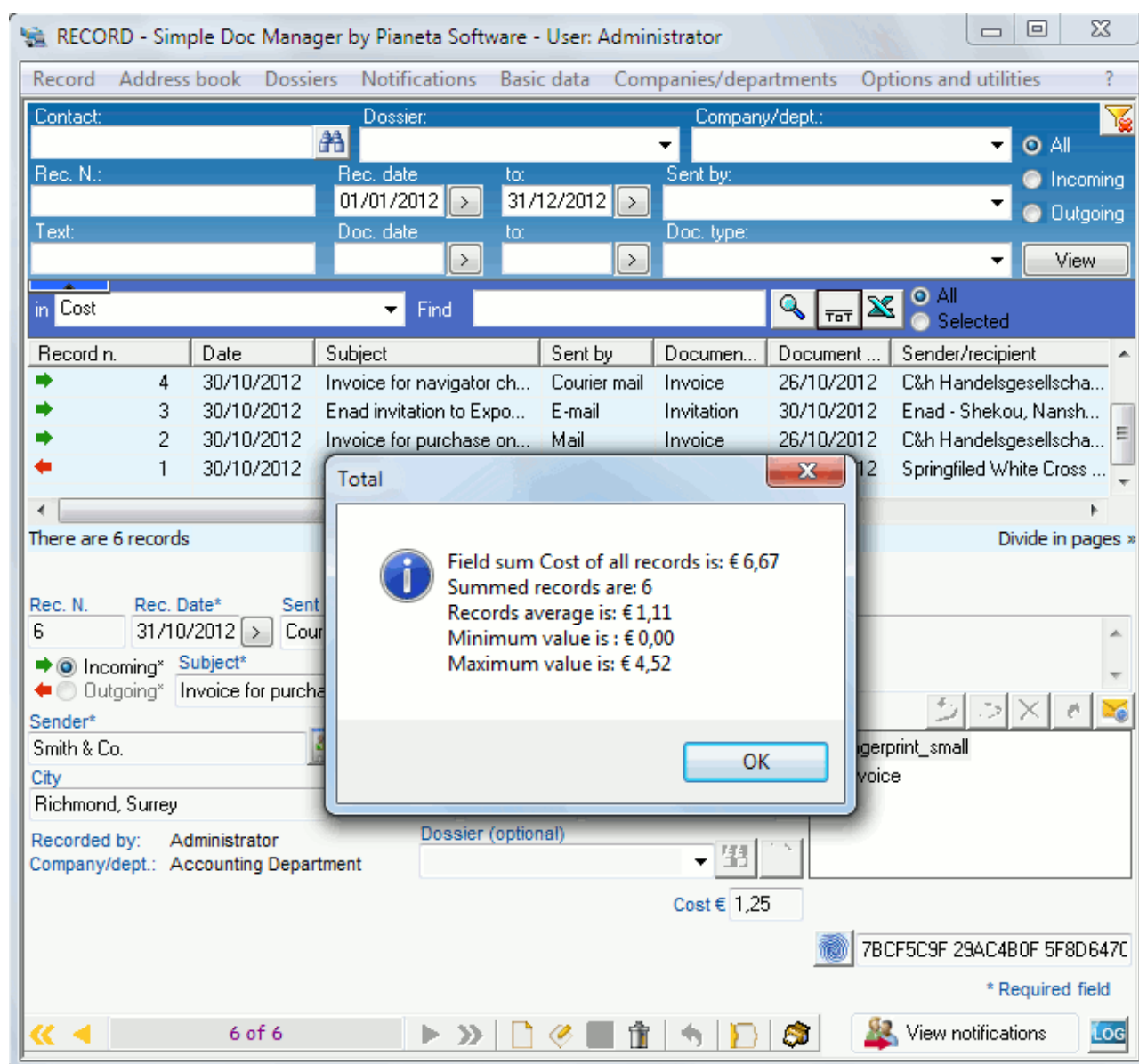




To compute the total of a records list:

- click on the arrow at the top left of the records list. A box as shown in the picture will open
- select the Cost field in the "in" box
- click on TOT.

The sum will be computed on all visualized records or just on selected records, depending on the checked circle on the right.



The screenshot shows the 'RECORD - Simple Doc Manager by Pianeta Software - User: Administrator' window. The interface includes a menu bar (Record, Address book, Dossiers, Notifications, Basic data, Companies/departments, Options and utilities) and a search bar. A table of records is displayed with columns: Record n., Date, Subject, Sent by, Document..., Document..., and Sender/recipient. A 'Total' dialog box is open, showing the following information:

Total	
Field sum Cost of all records is:	€ 6,67
Summed records are:	6
Records average is:	€ 1,11
Minimum value is:	€ 0,00
Maximum value is:	€ 4,52

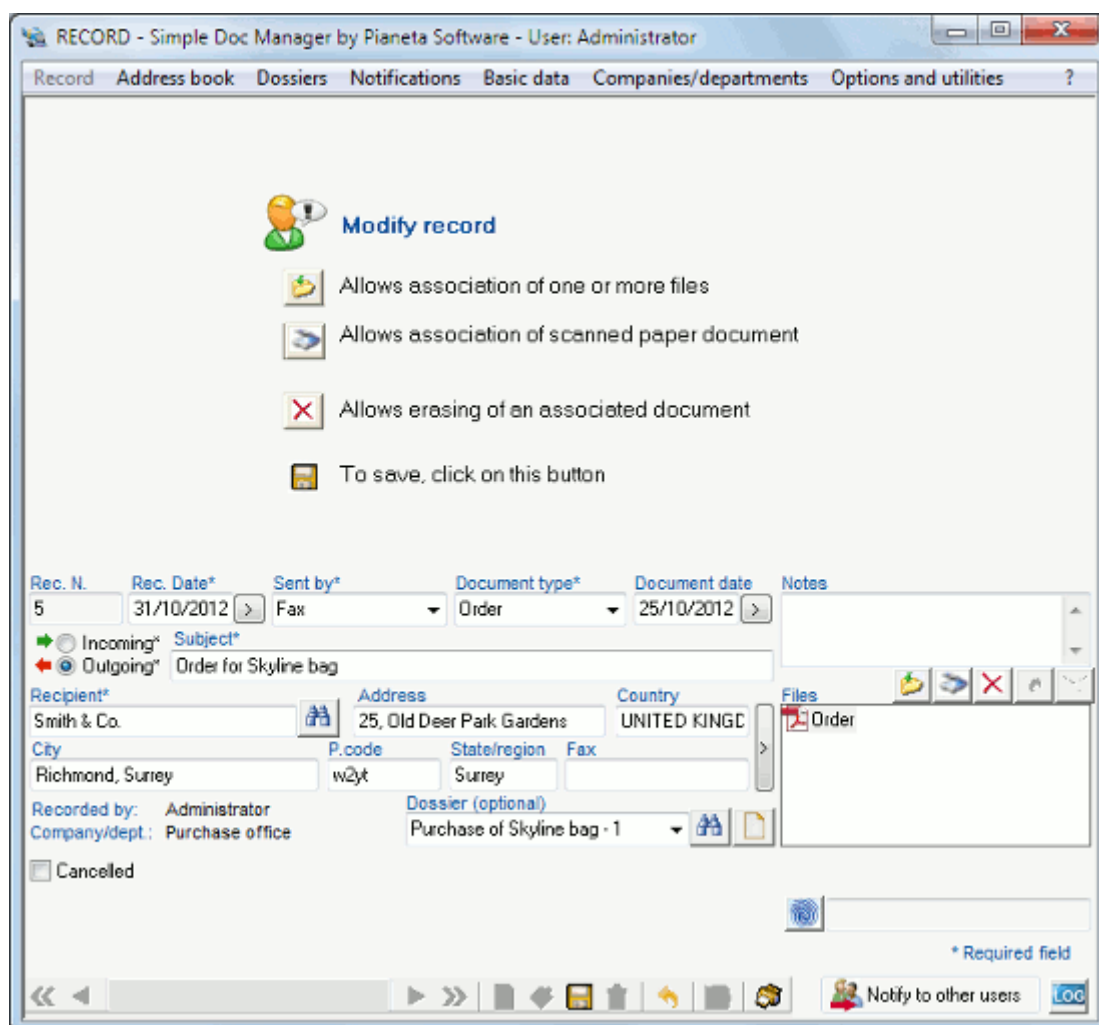
The dialog box has an 'OK' button. The background interface shows 6 records, with the first record selected. The 'Cost' field is highlighted in the search bar, and the 'TOT' button is visible. The bottom status bar shows '6 of 6' records and a 'View notifications' button.

## PLUS version functions

### *Cancellation of a record*

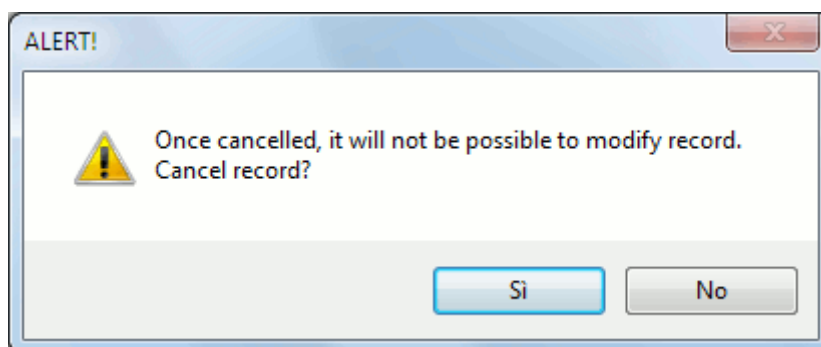
With the Plus version of Simple Doc Manager you may cancel a record if erroneously recorded.

The assigned record number will be kept, avoiding numbering blanks and all recorded info will remain in history, together with the reason of cancellation.




The screenshot shows the 'RECORD' window of Simple Doc Manager. The title bar reads 'RECORD - Simple Doc Manager by Pianeta Software - User: Administrator'. The menu bar includes 'Record', 'Address book', 'Dossiers', 'Notifications', 'Basic data', 'Companies/departments', and 'Options and utilities'. The main area has a 'Modify record' section with a green person icon and a list of options: 'Allows association of one or more files', 'Allows association of scanned paper document', 'Allows erasing of an associated document', and 'To save, click on this button'. Below this is a form with fields for 'Rec. N.' (5), 'Rec. Date\*' (31/10/2012), 'Sent by\*' (Fax), 'Document type\*' (Order), 'Document date' (25/10/2012), and 'Notes'. The 'Subject\*' field is 'Order for Skyline bag'. The 'Recipient\*' field is 'Smith & Co.'. The 'Address' field is '25, Old Deer Park Gardens'. The 'Country' field is 'UNITED KINGDOM'. The 'City' field is 'Richmond, Surrey'. The 'P.code' field is 'w2yt'. The 'State/region' field is 'Surrey'. The 'Fax' field is empty. The 'Recorded by:' field is 'Administrator'. The 'Company/dept.:' field is 'Purchase office'. The 'Dossier (optional)' field is 'Purchase of Skyline bag - 1'. At the bottom left, there is a 'Cancelled' checkbox. At the bottom right, there is a 'Notify to other users' button and a 'Log' button. A status bar at the bottom indicates '\* Required field'.

To cancel a record, click on Modify Record and check the "Cancelled" box in the bottom left.



A window will open, asking confirmation of cancellation.  
After clicking on “Yes”, a frame will open allowing input of reason for cancellation.

Record canceling



Following summary of data for record you are canceling:

Rec. N.	Rec. Date	Sent by	Document type	Document date	Notes
5	31/10/2012	Fax	Order	25/10/2012	

☒ Incoming  
☒ Outgoing

FP53  
Order for Skyline bag

**Recipient**  
Smith & Co. - Richmond, Surrey

**Address**  
25, Old Deer Park Gardens

**Country**  
UNITED KINGDOM


**City**  
Richmond, Surrey

**P.co**  
w2yt

**Recorded by:**  
FP45

Administrator  
Purchase office

**Dossier**  
Purchase of Skyline bag

**Associated**  
 Order

Input reasons for canceling record:

wrong recipient

Cancel record

Quit

After input of cancellation reason, click on “Cancel record” to complete cancellation action.

A cancelled record will be shown in grey in the record list and it will be impossible to modify.

RECORD - Simple Doc Manager by Pianeta Software - User: Administrator

Record Address book Dossiers Notifications Basic data Companies/departments Options and utilities ?

Contact: Dossier: Company/dept.:

Rec. N.:  Rec. date: 01/01/2012 to: 31/12/2012 Sent by:

Text:  Doc. date:  to:  Doc. type:  View

Record n.	Date	Subject	Sent by	Documen...	Document ...	Sender/recipient	F
6	31/10/2012	Invoice for purchase of ...	Courier mail	Invoice	25/10/2012	Smith & Co. - Richmond...	A
5	31/10/2012	Order for Skyline bag	Fax	Order	25/10/2012	Smith & Co. - Richmond...	A
4	30/10/2012	Invoice for navigator ch...	Courier mail	Invoice	26/10/2012	C&h Handelsgesellscha...	A
3	30/10/2012	Enad invitation to Expo...	E-mail	Invitation	30/10/2012	Enad - Shekou, Nansh...	A
2	30/10/2012	Invoice for purchase on...	Mail	Invoice	26/10/2012	C&h Handelsgesellscha...	A
1	30/10/2012	Offer for Defibrillator	E-mail	Offer	30/07/2012	Springfield White Cross ...	A

There are 6 records Divide in pages »

Rec. N. Rec. Date\* Sent by\* Document type\* Document date Notes

5 31/10/2012 Fax Order 25/10/2012

☒ Incoming\* Subject\* ☐ Outgoing\* Order for Skyline bag

Recipient\* Address Country

Smith & Co. 25, Old Deer Park Gardens UNITED KINGD

City P.code State/region Fax

Richmond, Surrey w2yt Surrey

Recorded by: Administrator Dossier (optional)

Company/dept.: Purchase office Purchase of Skyline bag - 1

**CANCELLED - Reasons for cancelling:**

wrong recipient

Cancelled on 06/12/2012 17:26:35 by Administrator

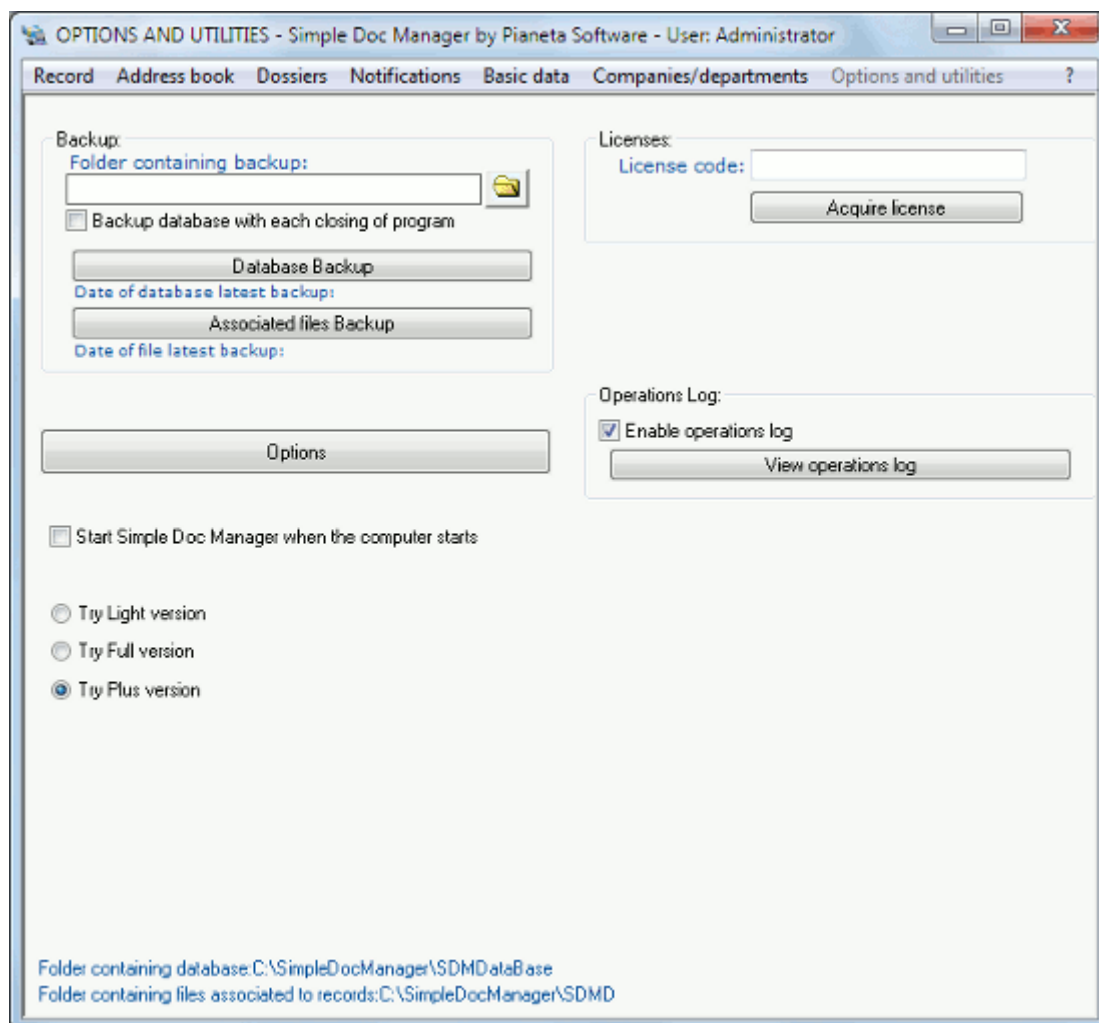
\* Required field

5 of 6 View notifications

## Operations Log

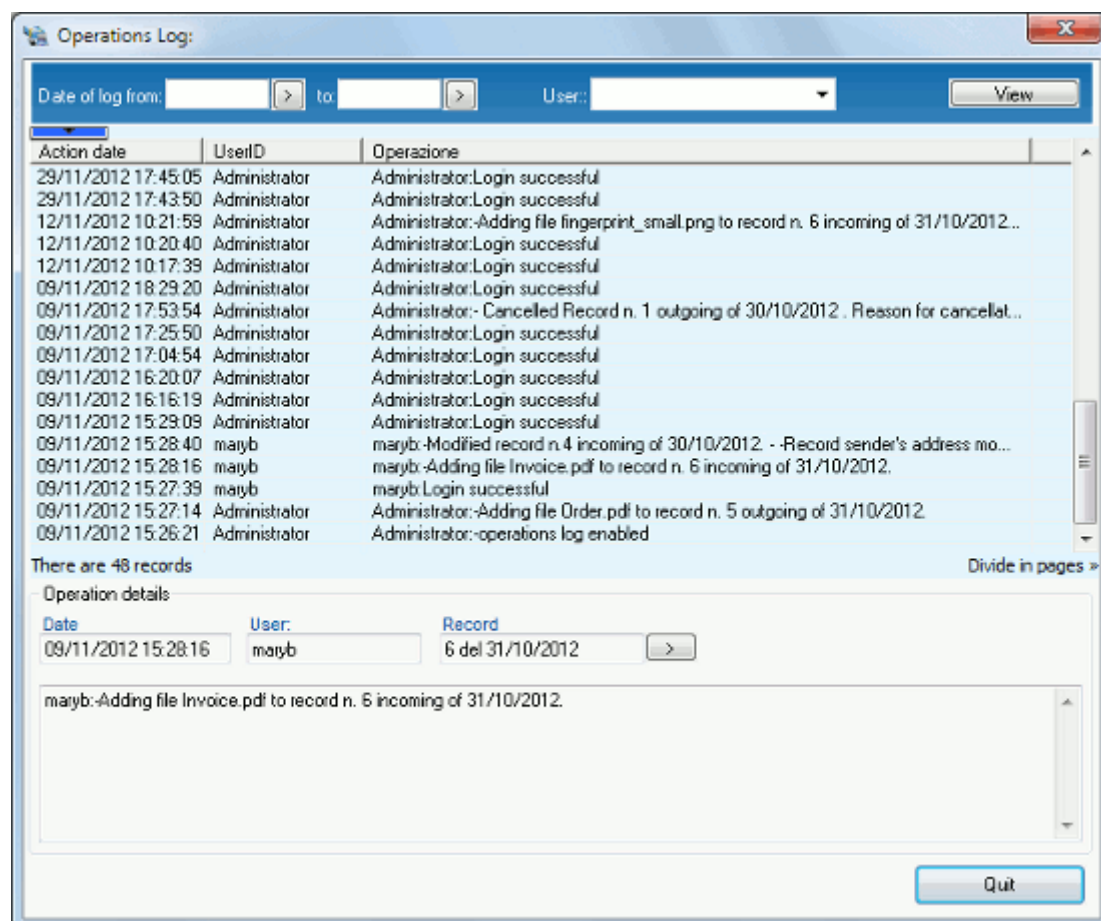
With the Plus version of Simple Doc Manager , you may even enable a Log of Operations, to keep track of all operations made by users on the different records.


The Operations Log may be enabled from the Options and Utilities form, checking the "Enable Operations Log" box.



From this moment on, all operations done on records, by all users, will be shown in the Operations Log.

To visualize Log, click on the View Operations Log button; a window with all logs will open, allowing filtering by date and by user:



You may even view logs of a single record, clicking on  at the bottom of the Records window.

## Multiple Scan (ADF)

In the Plus version of Simple Doc Manager you may scan more than one page in just one passage, using a scanner with Automatic Document Feeder.

To scan, click on **Add File from Scanner** button to open the **Acquire Image** window and then click on the **ADF Scan** button. Scanning of pages will start, stopping only when all pages have been scanned.

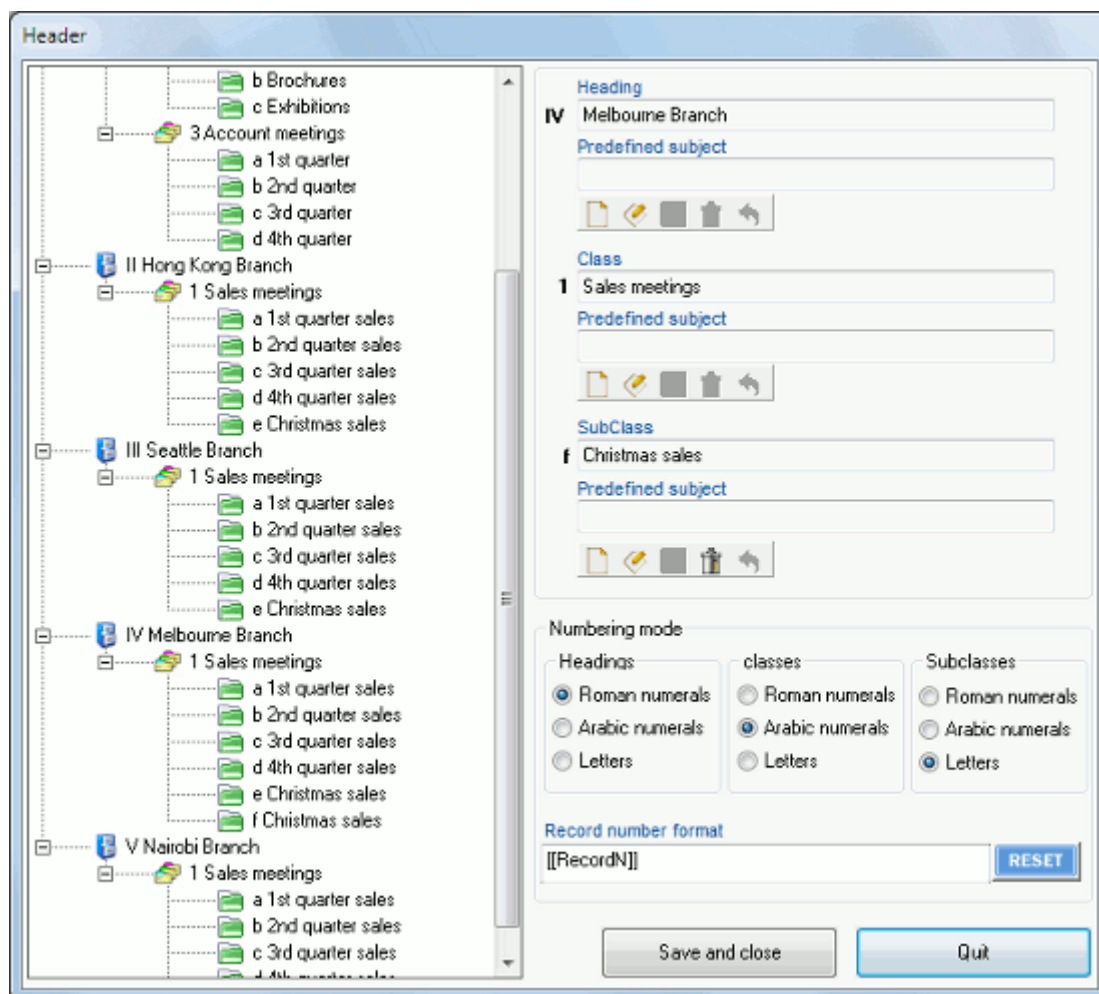


The scanned document may then be saved as PDF clicking on the **Create PDF** button.



## Header of classification

In the Plus version of Simple Doc Manager you may create a header and classify records.



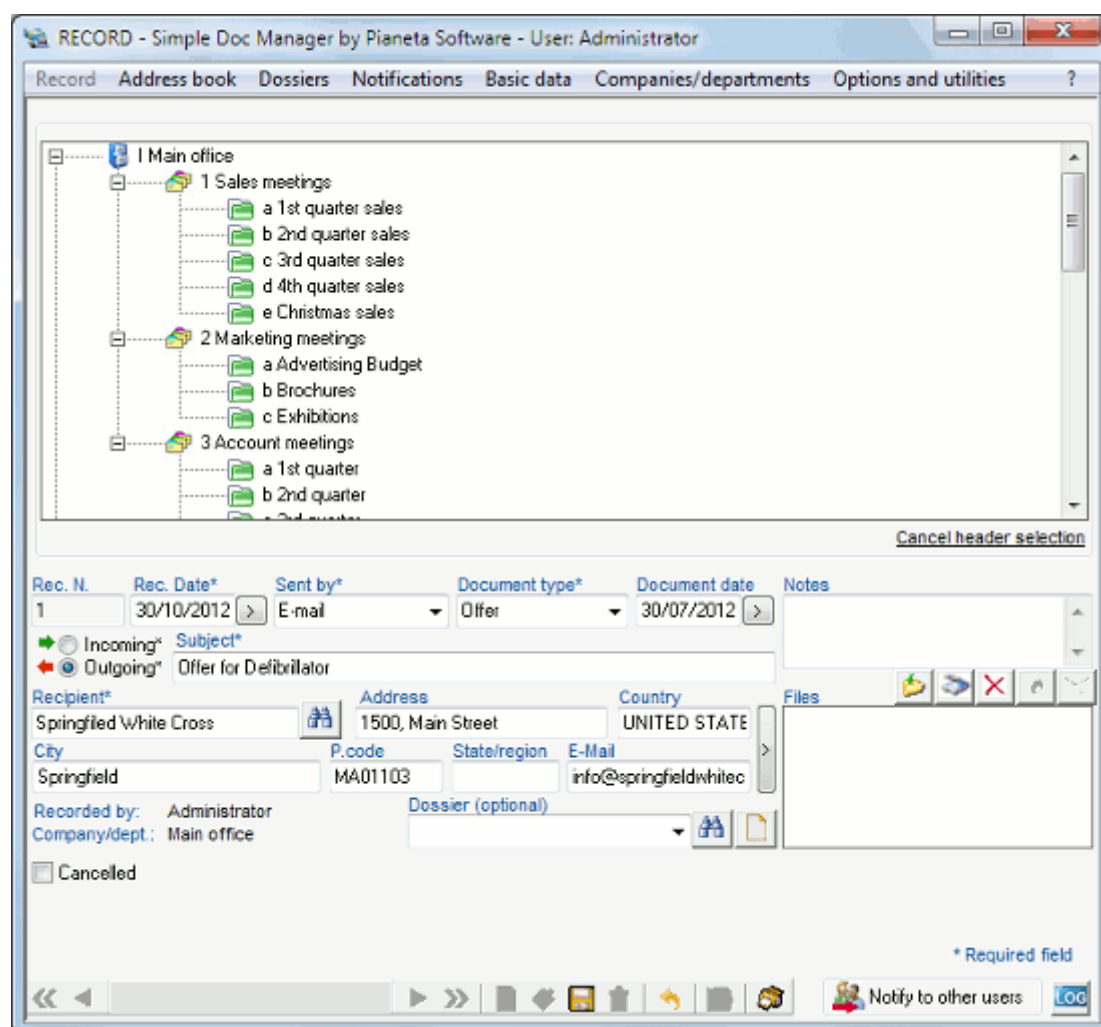
Header may be divided into headings, classes and subclasses.

For each heading, class and subclass you may define a predefined subject, applied to record once classified.

For headings, classes and subclasses, you may define if numbering should be in roman numerals, arabic numerals or letters.

If a header of classifications has been created, when inputting a new record, the tree chart will be shown, allowing classification of the record by simply clicking the heading, class or subclass of belonging.

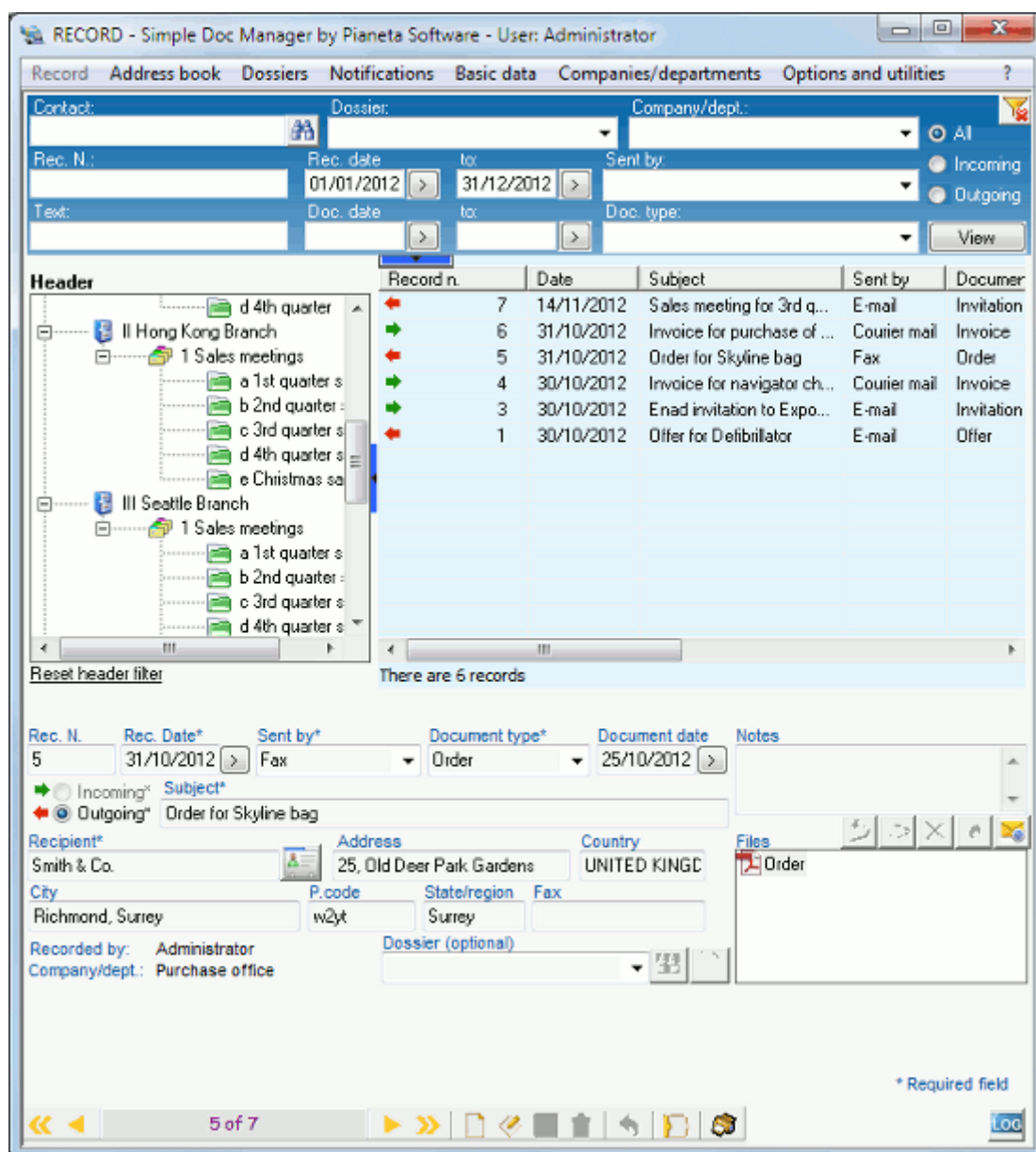




When a record is classified, the record number will also show heading, class and subclass.

From the Header setting window, you may set the format in which the record number will be created, inputting in the number any field by which the record was defined with related separators.

To view all records of a heading, class or subclass just select the heading, class or subclass of interest from the header on the left side of the screen.



**RECORD - Simple Doc Manager by Pianeta Software - User: Administrator**

Record Address book Dossiers Notifications Basic data Companies/departments Options and utilities ?

Contact: Dossier: Company/dept.:

Rec. N.:  Rec. date: 01/01/2012 to: 31/12/2012 Sent by:

Text:  Doc. date:  to:  Doc. type:

**Header**

- d 4th quarter
- II Hong Kong Branch
  - 1 Sales meetings
    - a 1st quarter s
    - b 2nd quarter
    - c 3rd quarter s
    - d 4th quarter s
    - e Christmas sa
- III Seattle Branch
  - 1 Sales meetings
    - a 1st quarter s
    - b 2nd quarter
    - c 3rd quarter s
    - d 4th quarter s

Record n.	Date	Subject	Sent by	Documer
7	14/11/2012	Sales meeting for 3rd q...	E-mail	Invitation
6	31/10/2012	Invoice for purchase of ...	Courier mail	Invoice
5	31/10/2012	Order for Skyline bag	Fax	Order
4	30/10/2012	Invoice for navigator ch...	Courier mail	Invoice
3	30/10/2012	Enad invitation to Expo...	E-mail	Invitation
1	30/10/2012	Offer for Delibrillator	E-mail	Offer

There are 6 records

Rec. N. 5 Rec. Date\* 31/10/2012 Sent by\* Fax Document type\* Order Document date 25/10/2012

☐ Incoming\* ☒ Outgoing\* Subject\* Order for Skyline bag

Recipient\* Smith & Co. Address 25, Old Deer Park Gardens Country UNITED KINGC

City Richmond, Surrey P.code w2yt State/region Surrey Fax

Recorded by: Administrator Dossier (optional)

Company/dept.: Purchase office

\* Required field

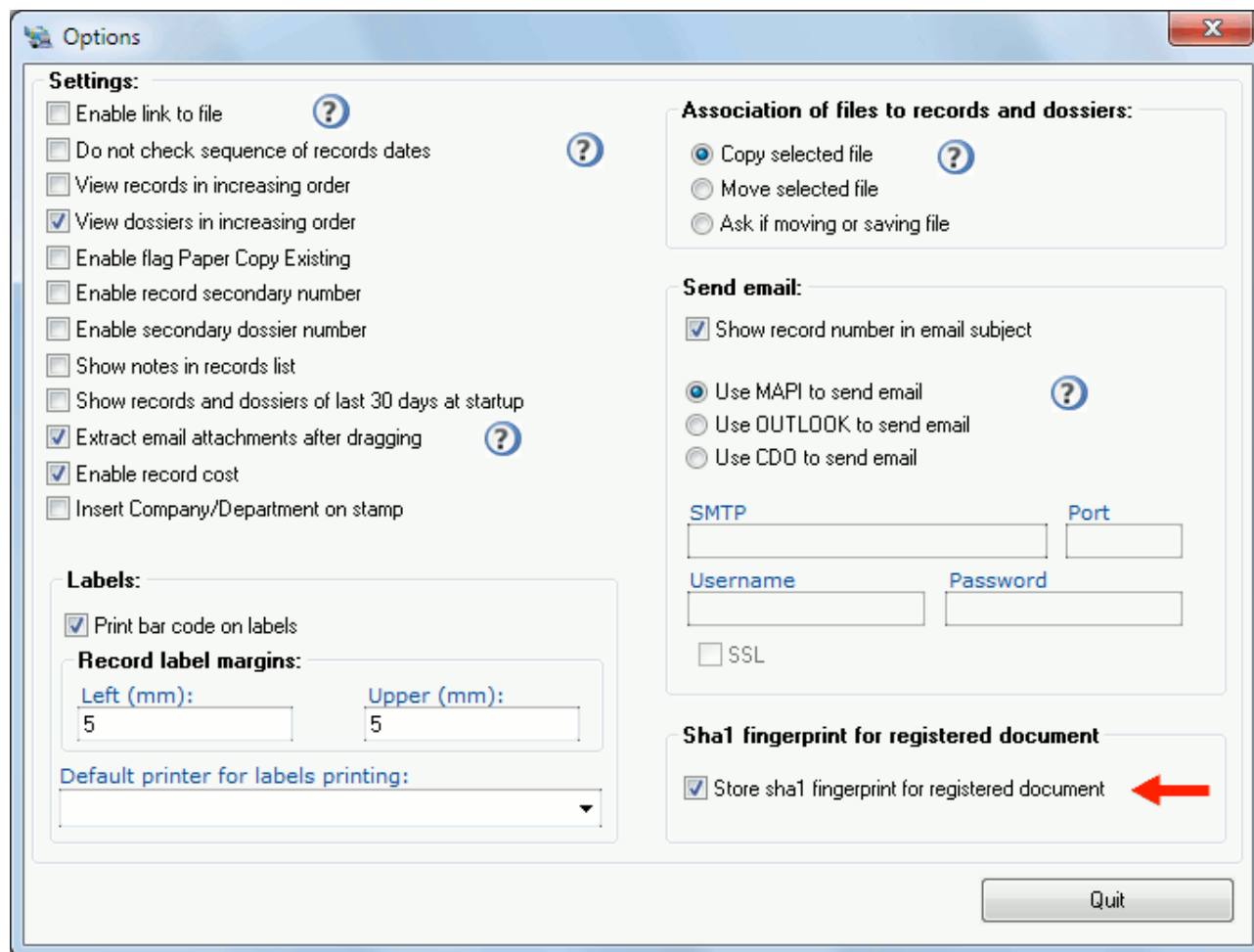
5 of 7

This filter may be combined with other search criteria, so you may filter for example all records of a certain classification, incoming or outgoing, in a certain range of dates, of a certain type, etc.

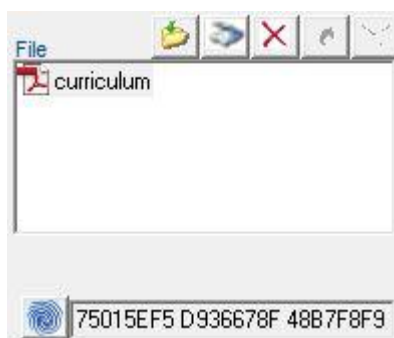
## Document SHA1


In the Plus version of Simple Doc Manager you may set a SHA1 for the recorded document.

Recording of SHA1 must be enabled from the Options window:



When a file is associated to a record, the SHA1 is recorded and cannot be further modified.



Clicking on  (SHA1 match), you may check recorded SHA1 with the one of selected record to verify possible manumissions.